Transport for Cornwall

Karyans rag Kernow

Bus Service Improvement Plan for Cornwall

Developed by Cornwall Council and the Enhanced Partnership

June 2024





Buses in Cornwall will provide an **excellent connection** between **people, communities, businesses** and **services**

Executive Summary

Cornwall's Bus Service Improvement Plan (BSIP) aims to achieve continuous growth in the use of our bus network, sustaining improvement and enabling excellence. It will enable us to deliver our vision that **buses in Cornwall will provide an excellent connection between people, communities, businesses and services in a way that is reliable, efficient, safe, inclusive and enjoyable and supports the delivery of the aspiration of a low-carbon Cornwall.** Our BSIP directly responds to the requirements of the Government's National Bus Strategy and builds upon the excellent progress already made to improve bus services through ongoing initiatives such as the One Public Transport System for Cornwall (OPTSfC) programme, the country's first Bus Fares Pilot scheme, our ongoing and award-winning partnership and the measures and improvements currently being introduced following the success of our first BSIP (2021) in securing Government funding (£13.3m BSIP Phase 1 and £3.9m BSIP Phase 2).

Forty-four percent (44%) of bus users in Cornwall choose to travel by bus because they are unable to make the same journey in any other way, rather than the bus being the more attractive option[1]. We want buses to be viewed positively, attracting more users out of choice, not necessity. To encourage more users to choose bus, we must continue to improve fares and ticketing (including integration and affordability), network coverage, frequency and reliability, customer service, accessibility, image, the provision of onboard information, and vehicle quality. We must demonstrate that Cornwall can deliver an attractive, sustainable and high-quality network in a rural area.

Our BSIP 2024 builds on the progress already made and reflects the priorities that people in Cornwall want to see, as a reflection of the views and aspirations of the Transport for Cornwall partnership.

Bus patronage has bounced back well following the pandemic. Total passenger journeys are 13% higher now than in 2019. Furthermore, we are encouraged to see that the growth has been amongst fare paying passengers.

Levels of satisfaction amongst bus passengers in Cornwall in 2023 were above the average for rural areas and England as a whole across all aspects of service provision. In particular, satisfaction with the value for money of bus travel was 75%, a significant leap from 57% in 2019, reflecting the success of the Bus Fares Pilot fares reductions along with the Government's £2 fare cap.

However, we are still on a journey of continuous improvement. Recent research amongst local bus users and non-users shows that concerns about consistency of service performance and unreliability still remain. People want more frequent and reliable services that enable them to get to where they want to go, when they want to go. Consequently, the Council and bus operators are committed to ensuring that network reliability is at the forefront of our delivery. This focus will strengthen the existing network and improve the quality of delivery so it can be the mode of choice for passengers, encouraging patronage and revenue growth.

Securing long-term revenue funding to support the network is imperative to fulfilling our vision for buses. The impact of the pandemic on the bus industry was severe and we are proud of the steps taken by the Transport for Cornwall partnership to kickstart our recovery and embrace the changes that have helped us rise to the challenge of collectively bringing Bus Back Better. The patronage growth and delivery of wider improvements since the BSIP 2021 are testament to the collective vision we hold for public transport in Cornwall. However, there remains a shared concern for the future with potential changes to UK Government, governance of the bus industry and therefore the ability for Cornwall to secure the funding required to maintain our current network against this uncertain backdrop. In recent years, BSIP funding has helped to provide much-needed financial support to keep our network stable – this has been the bedrock on which we have been able to achieve success and grow patronage but the future of BSIP and bus industry funding is uncertain. Fares have been reduced through the Bus Fares Pilot and £2 Bus Fare Cap Grant boosting patronage in Cornwall but these schemes and their associated funding are time-limited. Cornwall's bus network cannot afford to experience great change in the funding landscape from the operator, customer or local authority perspective; any changes to LA funding or fares revenue risks negatively impacting the network we have thus far protected and the growth in patronage we have achieved, making the long-term financial security of the network absolutely critical. Further, the ability to achieve our vision that supports the delivery of a low-carbon Cornwall through the long-term transformation of the network, hinges on this requirement to secure funding now.

We look forward to working with bus passengers, operators and other stakeholders to implement our BSIP ambitions in the coming years. We have seen what successful partnership delivery can achieve and are excited for the step-change in bus service provision and customer experience that is ahead.

Our BSIP will continue to deliver:

- **Simpler and more cost effective fares** for all
- **Cheaper fares for young people** to encourage them to become life-long users of public transport
- **An integrated bus network**, with enhanced services that are better aligned with one another
- **One set of integrated information that strives to be accessible for all** – making it easier for passengers to plan and use the network
- **More reliable bus journey times** and, where feasible, better routing to make journeys faster
- **Continued improvement in our infrastructure** that supports our services

1 Transport Focus Your Bus Journey Survey (2023)

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At a glance - Bus Vision

This Bus Service Improvement Plan (BSIP) covers Cornwall, reflecting its specific characteristics and needs, and building on the significant investment and development into the bus network by Cornwall Council and operators over recent years.



Working in partnership with bus operators and other interested parties, an Enhanced Partnership has been in place since early 2022. The Enhanced Partnership Plan incorporates our BSIP ambitions and supports two Enhanced Partnership Schemes which lock-in commitments and requirements for service development and improvement.

“This BSIP outlines the **key measures** that will be developed to help Cornwall **continue to progress** towards this vision, and its aim to **achieve continuous growth** in the use of the bus network that **sustains improvement and enables excellence**.”

The overarching vision for buses in Cornwall is that

“Buses in Cornwall will provide an excellent connection between **people, communities, businesses and services** in a way that is reliable, efficient, safe, inclusive and enjoyable and supports the delivery of a **low-carbon Cornwall**.”





1

Introduction

Buses are vital to the life of Cornwall and its residents. It is one of the few places in the country to have enjoyed steady growth in bus use.

Cornwall Council and its bus operators are confident that this provides a foundation from which to build Bus Back Better. Much has been achieved in the last few years, and this provides the backdrop to wanting to achieve much more.

We want to demonstrate what a truly world class rural bus network can look like and what impact it can make on people's lives. Cornwall set out ambitious plans for its future transport network as part of the 'One Public Transport System for Cornwall' (OPTSfC) programme. The original vision in 2016 to develop a high-quality, integrated and customer-focused network is very much on track. Significant levels of both public and private investment have been made in improving both bus and rail networks, alongside the facilitation, integration and promotion of active travel to raise the standards of the transport network.

Progress has been boosted by the ambitious Bus Fares Pilot project and the measures being introduced with BSIP funding from Government. The Enhanced Partnership has formalised ongoing commitments from transport operators and Cornwall Council to work better together, driving efficiencies and removing local barriers to achieving the vision for the benefit of our customers.

For a largely rural area with dispersed population, Cornwall has an excellent bus network. This comes from recognition by Cornwall Council of the importance of buses to the economic and social wellbeing of residents. As such, the authority has maintained significant levels of funding (committing £192m over 8 years) to provide a comprehensive level of service, supporting 50% of all bus mileage in the county. **Even through periods of pressure on overall Council budgets, the bus has been prioritised . By maintaining services, bus patronage has not only recovered since the pandemic, but increased**, in stark contrast to the picture across England as a whole.

Over the last 3 years, cheaper fares, tickets that can be used across the network (regardless of operator) and tap-on/tap-off fares capping have all made bus travel more attractive and easier to use. A partnership approach to the funding and provision of comprehensive information provides consistent messaging and the Transport for Cornwall branding helps to promote the network as a whole and develop wider awareness and positive associations with the brand across our communities.

Cornwall is now embarking on a significant marketing, engagement and communication journey, targeting specific potential user groups to encourage travel behaviour change and greater bus use. Recent work to develop fares, ticketing, information and the network itself provide powerful opportunities to promote elements of bus travel to new markets. Furthermore, recently awarded Zero Emission Bus Regional Areas 2 (ZEBRA 2) funding will herald the welcome introduction of zero emission buses in Cornwall and open up new opportunities to attract new users to sustainable transport.

Despite its strong position, there is still more that can be achieved to deliver the vision for bus in line with the National Bus Strategy. Building on the positive sense of partnership between the Council and its public transport operators, the Transport for Cornwall partnership continues to explore opportunities to work with other operators and stakeholders.

Cornwall remains well placed to develop its Bus Service Improvement Plan into the future and use its Enhanced Partnership to facilitate the delivery of further improvements.

Policy Context

Cornwall's Local Transport Plan and the Climate Emergency

Cornwall Council declared a Climate Emergency in January 2019 and set a target to become carbon neutral by 2030. This will require Cornwall to future proof its transport network to be both fit for purpose and sustainable for future generations. To be effective at addressing climate change we need to target investment where it will make the most difference, prioritising the affordability and simplification of bus fares and the provision of a truly integrated public transport network if we are to offer a realistic alternative to the car.

To meet Cornwall's carbon neutral target by 2030, Cornwall Council recognises that it must reduce CO2 emissions from transport by 80% (the remaining 20% will need to be offset) . The new Cornwall Transport Plan identifies three wide categories of policies to address this:

- **Reducing the transport demand** - Reducing car traffic, the biggest portion of transport emissions, can be achieved by reducing the reliance on private motorised transport. This can be done by reducing the distance between jobs, services and homes, making towns and villages more walkable and cyclable and accessible by public transport. A sensible use of technology to allow working, shopping and access to some services from home can also deliver a significant reduction in trips. This approach assumes a systemic change in our approach to planning development and service delivery.
- **Switching transport modes to low carbon modes** - Further development and integration of the public transport network to make transport between main towns and villages as seamless as possible. Better integration with walking and cycling, behaviour change campaigns and the location of public transport hubs at the centre of developments.
- **Switching to cleaner fuels** - An extensive effort will have to be made in co-operation with the Government to decarbonise road vehicles as quickly as possible as car transportation will most likely remain the main mode of transport for many of the more rural communities.

A key factor in achieving the required reduction in emissions will be the provision and promotion of an attractive and efficient bus network for the benefit of those who need to travel. A convenient, affordable and easy to use network will also encourage those making discretionary and infrequent journeys to switch modes for some journeys. The continued adoption of cleaner, lower emission buses powered by alternative fuels and the associated charging/refuelling/depot facilities is addressed in the Council's Ultra-Low Emission Bus Strategy and through the successful award of ZEBRA 2 funding to introduce 14 new zero emission buses to Cornwall in 2025.

This BSIP sits under the Cornwall Transport Plan and will direct the future development of the bus network. Complemented by Local Cycling and Walking Infrastructure Plans (LCWIP) and a forthcoming Transport Decarbonisation Plan, this suite of strategies will work together to address the transport challenges ahead.

Development of the Bus Service Improvement Plan

This Bus Service Improvement Plan (BSIP) covers Cornwall only, reflecting its specific characteristics and needs. Being in the extreme south west of the country it is largely self-contained, surrounded by the sea on all but one border with Plymouth City and Devon County Councils. The main cross-boundary demand for travel is to and from Plymouth. However, the rural and tourism-based nature of Cornwall means that it is very different to the urban environment of Plymouth, where the focus is mainly on travel needs within the city.

Despite the differences between the transport demands of Cornwall and its local authority neighbours, partners across the region work positively together to deliver cross-boundary services and improvements for passengers wishing to travel more widely in the south west. Supported by the work of the Peninsula Transport Sub-national Transport Body, future ambitions exist for a wider regional approach to public transport delivery.



Cornwall's position regarding bus provision is different from other authorities in the south west, having been granted permission to pursue bus franchising powers as part of its Devolution Deal in 2015. The authority has undertaken work to assess the case for franchising whilst pursuing the development of its One Public Transport System for Cornwall (OPTSfC) ambitions through partnership and the conventional specification and contracting of services that covered areas and corridors not provided commercially.

Through the OPTSfC improvement programme, Cornwall Council recognised that an integrated network with appropriate frequency, capacity and affordability was critical to encourage modal shift from the private car and reduce carbon emissions. Cornwall Council and its partners continue to be encouraged to see these themes reflected in the National Bus Strategy: Bus Back Better as priority areas, validating our achievements and endorsing our future direction.

Cornwall's original BSIP (October 2021) was developed in conjunction with public transport operators and local stakeholders, ahead of the formalisation of the Enhanced Partnership. Cornwall's BSIP 2024 has been developed with the Enhanced Partnership using insight from research undertaken to monitor the impact of BSIP and Bus Fares Pilot interventions, as well as feedback from Cornwall's local members, officers and stakeholder groups.

Cornwall's BSIP 2024 references the evidence base presented in BSIP 2021 and moves forward to present a current view of the challenges and opportunities of delivering bus service improvements in Cornwall.

Enhanced Partnership

Cornwall has a strong Bus Partnership Group, established in June 2021, which has overseen the development of an Enhanced Partnership (EP) Plan and Scheme, which were made in 2022. The EP Scheme is guiding the delivery of all bus initiatives, setting out the commitments for Cornwall Council and service requirements on the bus operators. The Scheme has been varied to update on progress and incorporate additional measures. Further, a second EP Scheme is currently being formalised to facilitate the Transport for Cornwall (TfC) marketing campaigns, branding and commitments by Cornwall Council and bus operators to the joint funding of comprehensive information provision across all media.

The Cornwall Bus Partnership, with membership as follows, has regular meetings to discuss and agree all public transport developments and proposals across Cornwall:

- Cornwall Council officers (Public Transport and Highways teams)
- All bus operators
- Transport Focus
- Cornwall Chamber of Commerce
- Great Western Railway

The BSIP and associated EP Schemes are live documents, continually refreshed and updated, aimed at driving improvements to bus services through the implementation of a series of projects and schemes. They will be reviewed annually and performance against targets reported regularly.

Case Study:

Transport for Cornwall Partnership - Best Alliance/ Collaboration of the Year (National Transport Awards 2023)

Demonstrating the successful public-private sector partnership between the Council and transport operators to transform the public transport network for its customers, the Transport for Cornwall Partnership was delighted to be recognised by the prestigious National Transport Awards in 2023 as the winner of its Best Alliance/Collaboration of the Year. The Partnership has worked hard to break new ground, collaborating positively on initiatives that have achieved patronage growth and placed the experience of customers at the heart of the delivery of the network.



Franchising remains an option

Cornwall's Devolution Deal for transport aimed to identify a sustainable delivery model for public transport in a rural setting. In parallel with a programme of public transport improvements delivered in partnership with operators under OPTSfC, a business case was prepared to explore the option of pursuing a franchising model to meet the OPTSfC objectives.

The financial assessment of the business case was updated in 2021 so that the baseline services represented the re-tendered network which commenced operating in March 2020, with assumptions to offset the patronage and other impacts of COVID-19. This update provided an opportunity to validate the responses of the model to the changes in service levels between 2015 and 2020.

The results of the financial modelling indicate that franchising is now a viable operating model for Cornwall.

The results of the financial modelling indicated that franchising is now a viable operating model for Cornwall. Prior to the re-tendering, it was difficult to build a business case for franchising as the gap between the additional costs of operating a more comprehensive bus network for Cornwall residents and the savings that could be achieved through per kilometre operating cost reductions and additional revenue from increased patronage was too high. The targeted network improvements incorporated into the 2020 tender exercise moved us closer to our objectives, meaning that moving to a franchising model, supported by the growth achieved through the delivery of the DfT Bus Fares Pilot, now becomes financially sustainable.

The tender exercise demonstrated how better value could be achieved – resulting in a strong customer-focused package bid that delivered significantly more mileage at lower cost, better quality and introduced strong incentives for growth, at operator commercial risk, compared to traditional local authority tendering. Central to this was the innovative, whole contract life approach taken by the operator, which included significant investment up front in over 100 new vehicles, an overhead savings partnership with other small operators and a third-party maintenance and property provider. It also included improved network coverage, new and improved connections, improved integration with rail, plus the integration of over 100 school routes.

The financial modelling for franchising demonstrated that the increased patronage above baseline levels as a result of Bus Fares Pilot combined with operating cost savings and investment in quality improvements would result in a viable franchising position from 2026 compared with the existing network.

The Enhanced Partnership modelled did not include operating cost savings or additional investments in service quality improvements. The financial modelling predicted an additional deficit per annum from 2026 when compared with the existing network. However, if operating cost savings could be achieved through the Enhanced Partnership model, together with quality improvements, then it could be possible to achieve a similar level of financial performance to the franchising model.

The National Bus Strategy provides clear focus around delivering a 'one network' approach. Opportunities exist in Cornwall to drive operating efficiency through a one network approach and to better integrate the uplift in summer services to drive value across the network. Competing for passengers drives costs, Cornwall does not have sufficient passengers for competing services or services that cherry pick hotspots and leave others unserved. Delivering one core network that can provide enhancements in service provision to cater for increased demands such as seasonal uplifts, whilst servicing the demand for schools and colleges in an integrated manner has the potential to deliver best value for all.

Potential future changes to national government create uncertainty around the governance models and funding available to deliver public transport across the country. What is known is that Cornwall remains committed to delivering a high-quality bus network for its residents working in partnership with its operators. Cornwall believes that the vision for buses in the area can be delivered through the Enhanced Partnership, however if this is not the case, franchising remains an option for the authority to pursue.

Aims and objectives of the BSIP

There is a shared ambition to build on the significant progress already achieved in Cornwall over recent years, and partners have agreed, the vision and objectives in the first BSIP. These are set out below and remain relevant to the current position.

Vision:

Buses in Cornwall will provide an excellent connection between people, communities, businesses and services in a way that is reliable, efficient, safe, inclusive and enjoyable and supports the delivery of a low-carbon Cornwall.

BSIP Goals:

Develop a bus network that increasingly meets more people's needs and provides an attractive alternative to the car.

Achieve increasing commercial viability of the bus network to:

- Enable operators to invest in service improvements, expansion and decarbonisation
- Free up public sector funding to kick start new initiatives and projects

Overall aim:

To achieve continuous growth in the use of the bus network that sustains improvement and enables excellence.

BSIP Objectives & the National Bus Strategy Objectives they support:

To achieve a bus network that is:

1) **Excellent**
- Buses that are more frequent
- More comprehensive bus services
- Buses that are better to ride in
- Greener buses

2) **Affordable**
- Buses that are cheaper to use

3) **Dependable**
- Buses that are faster and more reliable
- Buses offer a safe means of travel

4) **Accessible**
- Buses and services that are inclusive by design

5) **Effortless**
- Easier to understand bus network
- Easier to use bus network
- Buses integrated with other modes and each other
- Innovative provision of services

Overview of Cornwall

Located in the far south-west of England, Cornwall sits within a unique position having only one border with Plymouth City and Devon County Councils. Internationally renowned for its coastline (697km), countryside and attractions, Cornwall is a desirable location for business, living, tourism and leisure.

Cornwall's peninsula is 132km long - from Land's End in the south-west to the north-eastern boundary at Morwenstow, although the distance between its north and south coasts is highly variable, ranging from 8km in the west to 72 km in the east.

Key Demographics

Cornwall has a population of 573,000 people (2021), up 7% on 2011, with an average population density of 160 people per km^2, compared to an average UK population density of 281 people per km^2. Nearly two thirds of Cornwall's population live in small, dispersed settlements in areas that are defined as rural (ONS 2011).

Cornwall has an ageing population. Average age in Cornwall is 44 years old, compared to 40.4 years for the UK. Almost 30% of the population is over the age of 60, compared to 22% on average across the UK, whilst just over 21% of the population is aged 19 or under, compared to a national average of 23.5%. Cornwall's population is predicted to increase by over 10% to reach 631,531 by 2031, with clear expected changes in the age profile which will have a direct influence on the requirements of bus services in Cornwall, in particular:

15 – 29s: This might reflect expectations for a growing higher education sector, and on a positive note, gives Cornwall a growing young working age population – we need to give greater priority for how we meet the needs of the young person's travel market (and implications for funding discounts between 19-25yrs).

Over 60s: Population growth in this category far outstrips other age categories and will influence the requirement to provide bus services that enable continued accessibility, recognising that a bus service can provide a lifeline to those who have no other means of transport. This does, however, increase the local authority's re-imbursement costs to operators at the same time as potentially reducing farebox revenue.



Map 1: Cornwall and local authority boundaries

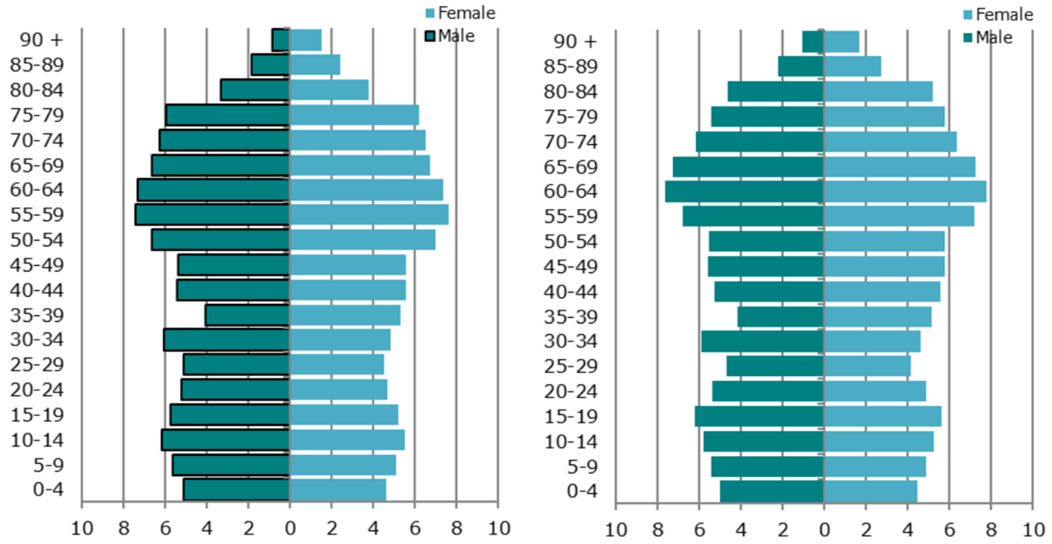
The population of Cornwall is dispersed and centred around towns (and cities in the case of Truro) although around half of the population live in small, dispersed settlements of less than 3,000 residents.

Cornwall has a population of

573,000

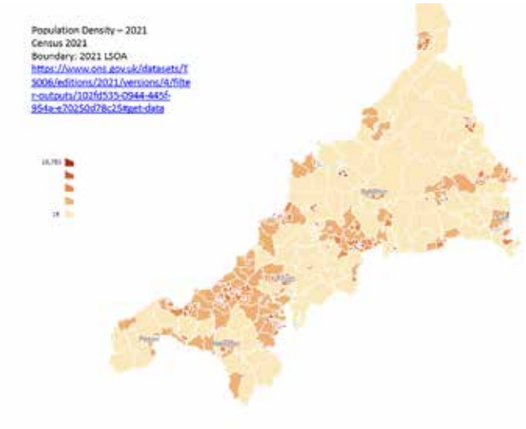


Fig 1: Cornwall's Expected Population Changes 2023 to 2028



Source: Population Projections - Cornwall Council
https://www.cornwall.gov.uk/health-and-social-care/public-health/joint-strategic-needs-assessment/population-projections/

Cornwall has a number of strategically important urban areas, which are formed from the towns of Camborne, Pool and Redruth (CPR), Falmouth and Penryn, St Austell, Penzance and Newlyn, Truro and Threemilestone, and Newquay. These are the only 6 urban centres in Cornwall with populations exceeding 20,000 and are the focus for employment, education and essential services.



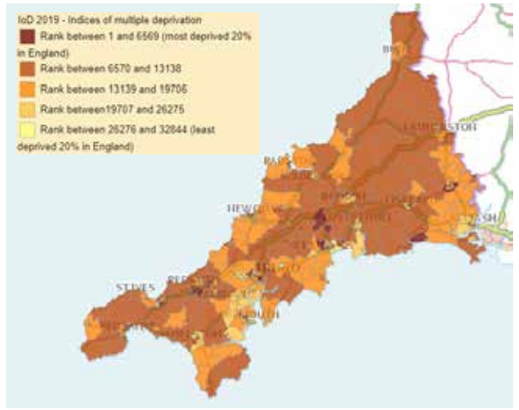
Map 2: Cornwall's population density

Half of the population live in small, dispersed settlements of less than

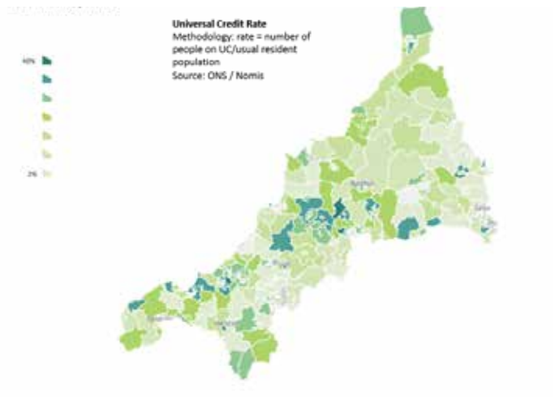
3,000

Deprivation levels

Deprivation manifests itself in low car ownership, low wages, high unemployment and high crime rates. Deprivation levels in Cornwall are high. 58% of Lower Layer Super Output Areas (LSOA) in the county, representing over 68% of the population, are within ranks 1 – 5 of the Indices of Multiple Deprivation (2019). Map 3 shows the Indices of Multiple Deprivation rank for all LSOAs in the county. Although deprivation is higher than in other areas of the country, unemployment levels are currently over 0.5% lower than the UK average. Map 4 shows the density of Universal Credit claimants.



Map 3: Deprivation levels



Map 4: Universal Credit Claimants 2021

> **Deprivation levels** in Cornwall are **high**.

Transport and travel

Road layout

The Cornish transport network is dominated by several strategic roads – the A30, A38 and A39 along with the main railway line to Penzance. The A30 (which is currently being upgraded in central Cornwall) provides the key strategic corridor between Penzance and Exeter, linking Cornwall with the regional and national road network via the M5 motorway. The A38 links south east Cornwall with Plymouth across the Tamar Bridge. The A39 provides a north west link to Bude and across to North Devon. A network of much smaller roads serves Cornwall's towns and villages, connecting them to the main centres.



Map 5: Road network

Car ownership

Cornwall has relatively high levels of car ownership, particularly in the more rural areas where often there is little alternative to driving. In 2021, just 15% of households had no car, down from 17.3% in 2011. 42% of households had 1 car and 43% 2 or more cars.



42% of households have at one car and **43%** 2 or more cars

Mode share

Cornwall has six Travel to Work Areas (TTWA) fully located in the county and three spanning the border between Cornwall and Devon and/or Plymouth.

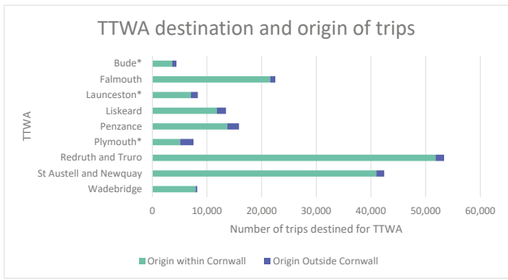


Fig 2: TTWA destination and origin of trips

*Destinations within the Cornwall area of this TTWA (excludes destinations within Devon and/or Plymouth area of the TTWA)

In terms of travel to work, Census 2021 indicated that 25% of workers were mainly working at home. 60% of workers used the car to work and just 1.3% (3,410) used the bus. This rose to 1.9% for all public transport, much lower than 3.4% for the South West as a whole and 7.9% for England and Wales.

(Note: the pandemic was still impacting workplace locations and commuting habits during the Census 2021.)

The Challenges for Cornwall

As a largely rural county with a dispersed population, the delivery of a comprehensive public transport network is challenging for both commercial operators and Cornwall Council, which provides significant support for bus services to provide a good standard of access and connectivity. The long journey times, challenging connectivity and high costs of delivery mean the bus has not compared favourably as a viable alternative to private car use. Such issues also create operational inefficiencies, jeopardising the viability of the services.

But for those without access to a car bus services are vitally important, particularly older and younger people, and for those that want to move away from a reliance on private vehicles. Buses can be key to levelling-up; users are disproportionately from less advantaged social groups and places. Improved services will strengthen communities, sustain town centres and reduce social isolation. Buses also have a critical role to play in the declared climate emergency.

And so, Cornwall Council and its bus operators are pressing ahead to deliver an ambitious bus network. By working together to address the challenges of planning and providing a high-quality bus network in a rural area, they believe that a significant change in travel behaviour can be achieved, delivering further passenger growth. Cornwall is a county that is recognised as progressive and forward-thinking in its transport ambitions and the alignment of the National Bus Strategy with Cornwall's vision will support the provision of its residents and visitors with a public transport system to be proud of.

> **Buses have a critical role to play** in the declared climate emergency.



2

At a glance

…We have made significant progress on delivering improvements to bus services as a result of the Devolution Deal, the One Public Transport System for Cornwall (OPTSfC) programme and the subsequent award of Bus Fares Pilot and BSIP funding to enable the delivery of schemes to further improve the public transport offer for our customers.

Prior to COVID-19 we had seen increases in patronage that were not being experienced in other parts of the country. Since the pandemic, Cornwall's bus patronage has bounced back and we are now seeing greater numbers of journeys being made on bus than ever before. This section explores the improvements that have been introduced since 2021 and insight into the passenger response:

- The Bus Fares Pilot and £2 Bus Fare Cap Grant are improving passenger satisfaction with value for money and lower and simplified fares are cited as a contributing factor to a greater use of bus. We are especially encouraged by a growth in fare paying passengers which positively supports the sustainability of the network. This growth is reinforced by stable levels of satisfaction - above average for rural areas and England as a whole - across all aspects of service provision, and most notably a growth in satisfaction with value for money.
- Reliability, frequency and buses that go more directly to more destinations remain key concerns for both users and current non-users. Improving the current reliability will help to instil confidence in the bus network which is vital is a rural area where many communities do not have the benefit of frequent and direct services, meaning that reliable services really are a lifeline for many. Our programme of BSIP bus priority works will help to address this going forward, along with a focus from operators that aims to deliver consistent reliability across the network.
- The customer information offer has significantly improved with the progression of integrated roadside and timetable information, plus a single website/app in development and new coordinated marketing under the Transport for Cornwall brand. Work continues to ensure that Transport for Cornwall is fully understood by our customers and that the benefits of engaging with the public transport network are portrayed positively to them.
- Branding and publicity is characterised by local operators, leading to a lack of cohesion and commonality across the network. The BSIP should therefore invest further in the **Transport for Cornwall** branding to ensure passengers are given a consistent and coherent message.

Introduction - The journey so far...

Before focusing on the priorities, it is important to recognise the excellent progress already made in improving bus services across Cornwall.

The Devolution Deal agreed with the Government in 2015 provided Cornwall with the mechanism to shape its transport services more effectively to meet the needs of residents and make journeys less fragmented. This OPTSfC work to date to introduce infrastructure improvements, lower emission and more modern buses, contactless payments and better information has been undertaken in partnership with operators and funded by the Local Growth Fund, Cornwall Council and the operators themselves, demonstrating the positive commitment to achieving our aims.

The delivery of OPTSfC interventions was focused specifically on the core network, taking a route-by-route approach to upgrading the basic waiting facilities (flags, timetable cases and shelters) and the addition of new vehicles into the fleet. Analysis undertaken at the end of 2019 showed that these upgraded routes achieved an average increase in patronage of 18% over the baseline (2015/16).

Since 2016, Cornwall has achieved continued progress in the development and enhancement of its public transport network. The award of £23.5m funding from Government to deliver the country's first reduced Bus Fares Pilot built on our foundation of improvements to date and provided the opportunity to address the challenging areas of fares that was set to make a significant impact on the attractiveness of bus.

The commencement of the Bus Fares Pilot from April 2022, aligned with the award of £13.3m BSIP (Phase 1) funding to implement a package of measures agreed with DfT that would help Cornwall work towards the delivery of its vision.

This was followed by a further award of £3.9m BSIP (Phase 2) funding in 2023.

Highlights of these three programmes so far are shown in the diagram on the following page:



Highlights of the Bus Delivery Programmes

One Public Transport System for Cornwall (2016-2020)

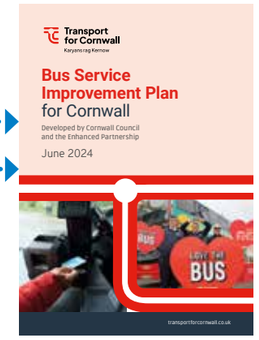
- £35m of private investment from operators on new, low emission buses.
- Innovative 8-yr local bus contract seeing investment in buses, additional mileage, integration with rail and schools.
- Development of single brand - Transport for Cornwall.
- Bus station upgrades at Newquay, Truro and Penzance.
- 80 new bus shelters and stop upgrades on core corridors. 2,300 new Transport for Cornwall branded bus stop flags and 2,400 new timetable cases.
- 335 real time information displays at bus stops, with real time information and wayfinding at rail stations.
- Removal of time restrictions for English National Concessionary Travel Scheme, allowing free travel at all times.

Bus Fares Pilot (2022-2026)

- Interoperability and introduction of Any Ticket, Any Bus.
- Most fares reduced by one third.
- Single range of fares products across all operators.
- Common discounts and eligibility for child fares.
- Tap-on / tap-off fares capping.
- Government-funded £2 Bus Fare Cap Grant, with both main operators participating.
- Evolving Product & Pricing Strategy.

Bus Service Improvement Plan (2022-2025)

- Bus priority schemes being delivered on our busiest bus corridors.
- Joint timetable and map showing all bus services and rail network.
- Young person's discount scheme to be launched in Summer 2024.
- Memorandum of Understanding with operators underpinning commitment and resource to consolidated information and marketing , engagement and communication activities.
- Single website/app in development.
- Annual marketing plan agreed including behaviour change campaigns.
- Focus group programme undertaken to gain insight on the impact of our delivery and to set future priorities.





Sources of funding for bus services

The table below identifies the revenue funding streams that deliver Cornwall's local bus network and the capital investment in bus since the BSIP (Phase 1) scheme delivery commenced in April 2022.

Budget/ funding	Source	Purpose	2022-2023		2023-2024	
			Capital	Revenue	Capital	Revenue
Local bus service support	Cornwall Council	Supported bus services contract	-	10,791,000	-	11,900,000
ENCTS Reimbursement	Cornwall Council	Reimbursement to operators	-	5,479,000	-	6,500,000
BSIP Phase 1	DfT		119,299	40,000	738,207	1,232,576
BSIP Phase 2	DfT		-	-	-	1,969,162
Bus Fares Pilot	DfT	Reduced fares trial	-	5,233,332	-	10,166,257

Note: This table does not include the current spend (c.£30m) on delivering statutory home to school travel assistance

Table 1: Sources of funding for bus services





What do people think about buses in Cornwall?

Your Bus Journey - 2023

The Transport Focus 'Your Bus Journey' survey in 2023 highlighted high levels of satisfaction with Cornwall's bus services, scoring higher than the average for rural areas and England as a whole on all measures.

	Total satisfied (%)		
Element	Cornwall	Rural areas	All England
Overall satisfaction	85	80	80
Value for money	75	69	67
Bus stop where bus was caught	76	75	76
Length of time waited for bus	71	69	68
Punctuality of bus arriving at stop	75	72	70
Bus driver	90	87	85
Length of time of bus journey	83	80	81

Table 2: Headline results from Your Bus Journey survey 2023

Those most satisfied with their bus journeys were older people (65+ years), many of whom would be travelling free under the English National Concessionary Travel Scheme. Lowest levels of satisfaction were expressed by young people (16-25 years).

Particularly of note is the value for money score at 75%, which was significantly up on the 57% in 2019. Whilst it is clear that the availability of the £2 fare cap has improved satisfaction, Cornwall has achieved an even greater increase in satisfaction than other areas where the £2 fare cap is in place, highlighting the success of the Bus Fares Pilot in reducing and simplifying fares and the ability to use any ticket on any bus through a full interoperability agreement between operators. With regards to dissatisfaction with bus services, by far the biggest cause was service punctuality.

Twenty-eight percent (28%) of respondents were using the bus to commute to/from work. The next largest groups were those travelling for leisure (19%) and shopping (18%).

Whilst 44% of passengers were travelling by bus because they did not have an option of travelling by any other means, encouragingly 14% were using the bus because it was more convenient than the car – significantly higher than the average figure across England of 8%. The survey also indicates that a higher proportion of bus stops in Cornwall had facilities such as shelters and information than other rural areas. Ratings for the on-board experience on buses in Cornwall, including security, comfort and cleanliness, were all higher than other areas. This was also the case for the bus driver in terms of helpfulness, attitude and smoothness of ride. These findings suggest that the Cornwall bus network has the potential to attract more use if improvements are properly targeted.

In order to understand the impact of some key interventions, additional 'local' questions were included in the Transport Focus surveys. 57% of passengers asked were aware of the Transport for Cornwall (TfC) brand and 62% were aware of the reduced fares offered through the Bus Fares Pilot. This insight has fed directly into developing the Transport for Cornwall brand strategy and promotion of bus fares and products.

Of those passengers indicating that they were using buses more often, the biggest reasons were to do with a change in personal circumstances (52%) and lower or simplified fares (37%). In Cornwall, compared to other places, the ability to use tickets with different bus companies and the combined bus operator timetables were significant factors.

Focus Group Programme

Whilst the findings of the Your Bus Journey survey are very encouraging and demonstrate the impact of the improvements we are delivering, there is clearly more to be done. Between 2016 and 2019, Cornwall Council commissioned its own customer research by way of a programme of focus groups to better understand what people want specifically from the bus network in Cornwall. This was refreshed in 2023 to provide comparisons with the situation pre-COVID and to help establish what our priorities for the bus network should be in the next few years.

The research highlights that:

- **Almost half of respondents are using buses more frequently, mainly due to lower fares.**
- **The more people use buses, the more likely it is to become part of their routine.**
- **Two fifths said they had made more bus journeys as a result of the reduction in bus fares.**

Key issues identified were service frequency, reliability and buses that go more directly to more destinations.

Bus users suggested that service performance had deteriorated and was inconsistent. Equally, non-users perceived that services were unreliable.



Fig 3: Word Cloud - bus network issues

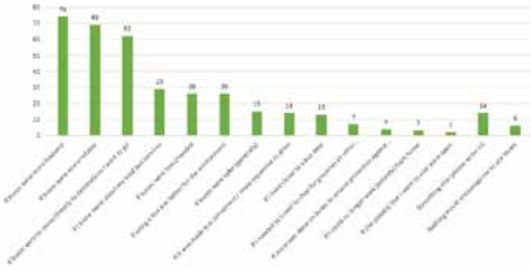


Fig 4: What would encourage greater bus travel?

> **"The prices are really good,** but ....buses are definitely unreliable **"**

Fares and ticketing were viewed positively:

- Reduced fares have encouraged more bus use, the £2 flat fare is perceived as good value for money and helps makes buses simpler to use and more accessible.
- £2 fare reversed negative customer views on flat fares encountered in previous research where respondents felt that it was unfair to charge the same flat fare for short and long journeys.
- Strong awareness of the headline fares promoted in Cornwall.
- Any Ticket, Any Bus was strongly supported and 'expected' in many cases.

> "Accepting tickets across the operators is **really convenient**"

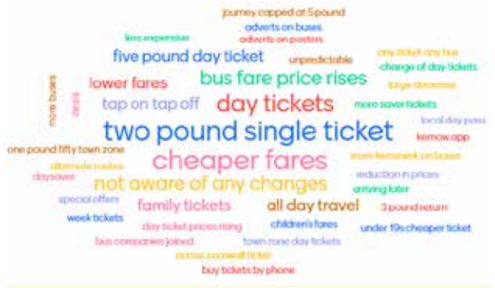


Fig 5: Fares and ticketing

> "**I think the flat fare is really good** because it makes it easier to use because you know what you will pay each time, and it makes longer journeys more accessible"

Understanding people's perceptions and experiences is helpful in setting future priorities, as follows:

One Network

- Focus on delivering the current network better, with consistently reliable services.
- Ensuring that the network offering can meet travel demand.
- A network that offers viable journey options with the availability of attractive services.

One Ticket

- Maintaining reduced fares to help provide good value and make buses easier to use.
- Important to maintain awareness of fares and ticketing offers.
- Maintaining interoperability.

One Brand, Timetable and Standard

- Consistent messaging and information for all, regardless of operator.
- Improve and simplify passenger information and its availability.
- Better promotion of journey opportunities so people understand what is on offer.

The findings of the research were shared with the Enhanced Partnership Group and an EP workshop held to discuss future priorities. Bus operators recognised the key issues and agreed that immediate priorities must focus on delivering our existing network to the consistent quality intended. This service reliability is central to encouraging greater confidence in the use of the network, providing a sound foundation for future development.

One Ticket

BSIP 2021 provides the evidence base around Cornwall's fares and ticketing. This section gives an overview of the fares and tickets available to bus users in Cornwall and looks at ticketing usage in relation to recent interventions.

Bus Fares Pilot (BFP)

Designed to assess the impact of lower fares on bus patronage, the Government-funded (£23.5m) 4-year Bus Fares Pilot (BFP) was launched in April 2022. The Pilot aimed to subsidise bus fares over a 4-year period with a view to incrementally increasing the public-facing fares while reducing the reimbursement to operators until such a time as fares were deemed to deliver a sustainable exit from the Pilot.

In the 3 months leading up to the launch, operators entered into an interoperability agreement to accept one another's tickets and began offering standardised child discounts for young people under 19.

Adopting a common approach to ticketing and ticketing products set the foundation for the commencement of the BFP in April 2022. At the time of the launch the Pilot initially provided an average reduction of 36% across all ticket types and introduced a number of 'headline fares' such as £5 Adult Cornwall Day (down from £9) and £20 Adult Cornwall Weekly tickets that allowed unlimited travel across the county. Town Zone fares were also introduced to encourage greater local bus travel.

These fares were complemented by 5 single and return fare bands, Town Zones and the Cornwall-wide products across adults and child fares. A family ticket for day and weekly travel was also introduced.

Tap & Cap technology was introduced in July 2022, allowing passengers to tap and tap off using their contactless payment device and having their journeys capped at the Day or Weekly ticket price.

Table 3: Bus fares pre-BFP - current

Demographic	Ticket Product	Pre-BFP	Apr-22	Jul-23	May-24
Adult	Cornwall Day	£9.00	£5.00	£7.00	£7.00
	Cornwall Week	£28.00	£20.00	£25.00	£25.00
	Cornwall Month	£100.00	£80.00	£90.00	£90.00
	Town Day	£3.00	£2.50	£2.50	£3.50
	Town Week	£13.00	£10.00	£10.00	£14.00
	Town Month	£50.00	£40.00	£40.00	£56.00
Child	Cornwall Day	£4.50	£4.00	£4.50	£4.50
	Cornwall Week	£14.00	£13.50	£15.00	£15.00
	Cornwall Month	£50.00	£45.00	£50.00	£50.00
	Town Day	£1.50	£1.50	£1.50	£2.20
	Town Week	£6.50	£6.00	£6.00	£8.80
	Town Month	£25.00	£22.50	£22.50	£33.00
Family	Cornwall Day	£18.00	£10.00	£15.00	£15.00/*10.00
	Cornwall Week	£56.00	£40.00	£50.00	£50.00/*30.00

*Fares reduced for the summer period to encourage sustainable tourism and assist with seasonal demand management on Cornwall's highway network

£2 Bus Fares Cap Grant (BFCG)

In January 2023, the Government introduced a national grant to cap single bus fares at £2 under its Help for Households scheme. Initially announced as a 3-month scheme, the BFCG was extended and is currently due to end in December 2024.

Since January 2023, both the BFP and BFCG have operated in parallel. Cornwall's bus passengers have therefore benefitted from the reduced fares delivered by both schemes.

The table below shows the changes to adult single fares from the period prior to the Bus Fares Pilot to May 2024.

Table 4: Adult single fares from pre-BFP - current

Demographic	Ticket Product	Pre-BFP	Apr-22	Jul-23	May-24
Adult	Single band 1	£2.00	£1.60	£1.60	£2.00
	Single band 2	£3.00	£2.00	£2.00	£2.00
	Single band 3	£4.00	£2.60	£2.00	£2.00
	Single band 4	£5.00	£3.00	£2.00	£2.00
	Single band 5	£6.00	£3.50	£2.00	£2.00

Impact of Fares Schemes

Key facts

- Over 6.6m discounted tickets have been sold, with over 12m journeys made, since the start of the BFP in April 2022.
- Passengers in Cornwall have saved over £14m since the Pilot began.
- As a result, total journeys on Cornwall's bus network are 13% higher in 2023 compared to 2019.
- Fare paying passengers have increased by 56% since 2019 and make up a far larger proportion of the total bus passengers (55% in 2023 compared to 40% in 2019).
- Interoperable ticketing has made travel easier to understand and more flexible – over 1m interoperable journeys have been made since the Pilot's introduction.
- Consistent ticket classifications mean more people can access cheaper fares: over 17,000 16 -18 year olds in Cornwall have access to child fares.
- 72% of all BFP journeys were on an adult ticket in 2023/24.
- 27% on a child ticket.
- 1% on a family ticket – currently very seasonal.
- The Pilot changed the tickets people buy, with notable growth in great value day tickets in the first year – during this time 30% of BFP journeys were made on day or bundle tickets.
- Since the introduction of the national £2 single fare cap, overall patronage growth has remained strong – but many passengers have shifted back to buying single tickets.
- Seasonal peaks normally experienced in the summer are not currently as extreme as previous years, suggesting patronage growth in the off-season.

Cornwall is now seeing record numbers of passengers using bus, with faster recovery from the pandemic attributed to the availability of lower fares in Cornwall from April 2022.

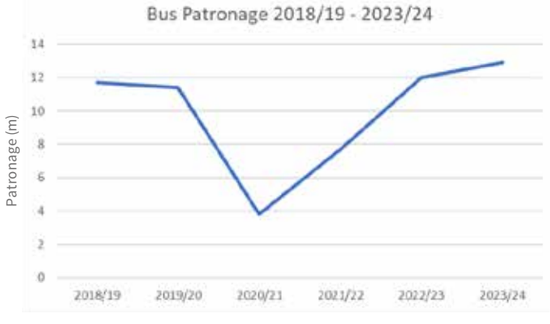


Fig 6: Bus patronage

Product Shift

In the first year of the Pilot, the headline £5 day ticket encouraged a notable product shift from single and return tickets, with the added value of all day travel attracting people to this ticket. In 2022/23 these accounted for 9% of BFP ticket sales and were being used, on average, 2.8 times. As the price of the day ticket was increased in July 2023 to £7, reflective of the availability of the £2 BFCG fares, the popularity of the countywide tickets reduced by 36% and accounting for 3.4% of sales, although ticket usage itself rose to an average of 3.1 times.

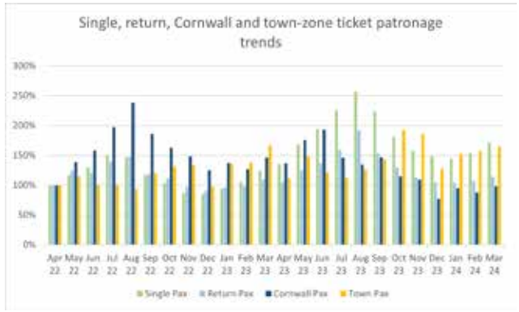


Fig 7: Ticket type trends

Throughout 2023 single ticket patronage was higher than the levels seen in 2022, demonstrating the appeal to users of cheaper and easy to understand fares. A 59% increase on the number of single tickets sold in 2023/24 was seen, compared to 2022/23.

Fare band 1 represents the shortest fare band in Cornwall – it has consistently been the most popular of the single bands, indicating the use of the bus for shorter distance trips remains strong.

Whilst growth of single tickets has been seen across all fare bands. There has been specific growth in the longer fare bands (Fare band 4 & 5) and the proportion of their sales now makes up 33% of single journeys, compared to 24% in 2022/23.



Fig 8: Adult single ticket sales

People are responding to best value and this graph shows the shifts between the share of discounted tickets at key points in Cornwall's fare journey:

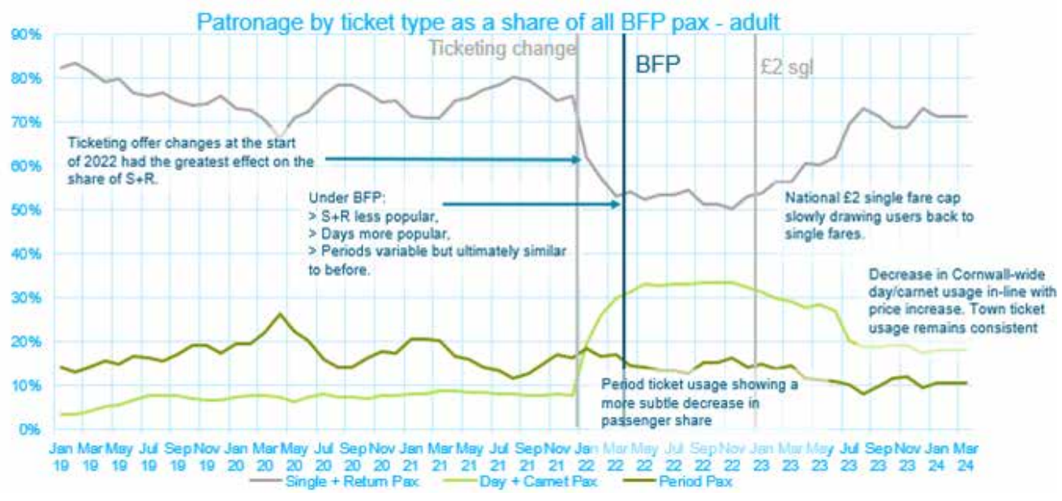


Fig 9: Patronage by ticket type as a share of all Bus Fares Pilot Passengers (Adult)

Cornwall has delivered a growth in farepaying passengers throughout the term of the BFP so far – now accounting for 55% of all bus patronage. Growing the farepaying passenger base was an aim of the Pilot and we are comforted by this growth, recognising the impact on the financial viability of the network going forward.

Whilst concessionary passengers are slowly returning to bus following the pandemic, they currently account for 23% of passengers (32% in 2019) and Cornwall is keen to encourage the return of these passholders.

Education now accounts for 14% of bus patronage – similar to 2019, but with a lower proportion of movement on University tickets.

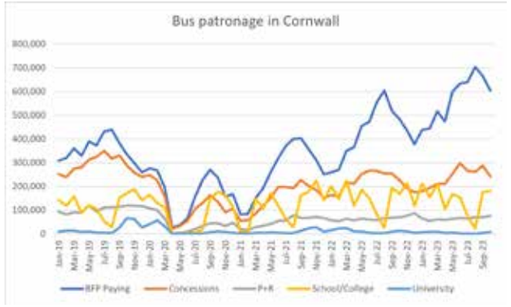


Fig 10: Bus patronage by passenger type

Other fare schemes

In 2023/24, the Council and its operators have achieved real progress in establishing ticketing schemes to help targeted groups:

- Funded by Cornwall Council, free bus travel for care experienced young people under 25 yrs old was launched in June 2023. Nearly 5,000 journeys were made in the first 10 months of the scheme, providing vital social, employment and educational links for this cohort.
- Funded by operators, Transport for Cornwall became a Recognition Partner of the Tempo Time Credits charity to reward the valuable work that volunteers undertake across the community. Volunteers can exchange volunteering time credits for bus tickets to assist access volunteering opportunities or to enjoy at their leisure.
- Funded by the Government, Cornwall Council was awarded funding in 2024 to reduce health inequality and make active lifestyles more attractive and achievable. Bus operators have agreed to work in partnership with the Council's Active Travel Social Prescribing team. This team 'prescribes' free bus travel to enable access to active travel opportunities, supporting adults to change and embed sustainable travel into their lives.

Looking forward

Ensuring that fares remain at a financially sustainable level for bus operators and the public is vital to maintain and grow both patronage and the network further.

Cornwall and its operators are committed to working together to ensure that the fares and ticketing offer remains attractive and affordable, recognising the impact that the simplified and more affordable fares introduced by the Bus Fares Pilot and Bus Fares Cap Grant have had on patronage.

Having reduced child fares and standardised the eligible age to all under 19s, Cornwall is now exploring discounts targeted at local young people to reduce the transition from child to adult fares as young people move into higher education and employment. with the aim of keeping young people up to age 25 years loyal to bus travel for longer.

Following the success of Cornwall's pilot providing free bus travel to care leavers, there is a wider recognition that targeted fares discounts for those most in need carries many benefits in terms of access to essential services and wellbeing. Additional groups will be considered for targeted fare discounts in the future.

A Product & Pricing Strategy is currently in development which will help to manage a sustainable exit from the Bus Fares Pilot. This Strategy will identify fares and ticketing products that are attractive to passengers, aimed at encouraging wider bus use, as well as generating the revenue required to support the network. It will also identify opportunities for future product development and transitioning

One Network

BSIP 2021 provides the evidence base around Cornwall's network. This section gives an overview of the network in relation to recent interventions.

Supported Service Contract

Cornwall Council supports circa of 50% of the mileage operated in Cornwall. The supported network is currently contracted to Go Cornwall Bus until March 2028 (8-yr contract). This followed the Council's aim to identify opportunities to create strategic relationships with key suppliers that would share the same vision and ambition for Cornwall and allowed long term planning and investment into Cornwall's transport network.

The awarded contract represented a significant milestone to the transport provision in Cornwall, with a strong focus on quality, increased focus on customer experience and value-adding opportunities, while retaining the presence of small operators in the market via sub-contracting arrangements. The starting date of the contract, March 2020, coincided with the outbreak of COVID-19. This delayed the materialisation of the ambitious growth aspired to with the amalgamation of all supported routes into one single package and the integration of over 100 school routes at the point of award. Better connections with rail were also introduced, reducing waiting times in stations and allowing a holistic approach for end-to-end journeys.

Additional school routes have been integrated into the public transport network (now over 130), providing operators with certainty of revenue and allowing the Council to offer a greener solution by minimising the need for additional vehicles. The opportunity for integration is reviewed at each network review.

Network Communications

Network updates and changes are communicated to Elected Members via an All Members Briefing hosted by the Council and with the operators in attendance. This provides an opportunity for building a culture of 'no surprises' with Members so changes can be confidentially communicated in advance and for feedback to be received after the Spring and Autumn changes. This has resulted in strong support for public transport, with Members playing a crucial role in developing and introducing initiatives such as the Newquay Pop-up Park & Ride (now in its 3rd year) and the Saltash Red Bus service.

Working Together – Network Improvements

With the "making" of Cornwall's Enhanced Partnership (EP) in Apr 2022, Cornwall was able to share its aspirations with commercial operators and work towards an integrated network. The making of the EP seals the commitment of Cornwall Council, its bus operators and stakeholders to further improve public transport connectivity and access to facilities and services, offering a viable alternative to car use. This combined approach aimed to overcome the drop in patronage suffered during the pandemic and re-establish the virtuous cycle of growth and development that was underway before the pandemic.

With an emphasis on keeping the network stable, the Council and operators work collaboratively to carry out intelligent network reviews, led by data and evidence to maximise the utilisation of resources and provide the public with the best travel opportunities.

Using BSIP funding, a new approach to delivering rural transport was launched in April 2023 in partnership with a community transport provider, Saltash Red Bus (SRB), and Go Cornwall Bus (GCB). This innovative approach sees GCB provide support for service registration, planning and the supply of ticket machines while SRB provide the vehicles and drivers that facilitate vital links for extremely rural communities.

Case Study:

Saltash Red Bus



In October 2022, following the withdrawal of a handful of underused bus services in south-east Cornwall by Go Cornwall Bus (GCB), a new Community Bus service to plug some of the gaps left by the service withdrawals was developed.

Local Councillors and residents were concerned that some very rural communities would be left isolated without access to public transport and approaches were made to bus operators and Cornwall Council.

Utilising BSIP revenue funding for 2 years, Saltash Red Bus (SRB) and GCB began working together to operate 7 routes under a Section 22 Registration in April 2023.

GCB assisted with timetabling, supplied ticket machines and associated infrastructure and supported the service set-up and registrations. SRB supplied the vehicles and the staff to operate the routes.

To make efficient use of resources, routes are operated between SRB's existing school runs and offer journeys to various towns where passengers can access health appointments, work, shopping and social opportunities.

The routes now in operation have been amalgamated to four but patronage numbers are steady and growing; a duplicate vehicle now operates on one of the routes. The Council and bus operators continue to review the service operation to identify future opportunities for service improvement and potential expansion of this operating model.

BSIP Phase 1 and 2 revenue funding has also been utilised to stabilise the network and secure socially necessary services between and to key towns. This revenue funding was absolutely critical to maintaining the bus network on which growing numbers of Cornwall's residents rely. Enhancements were funded on services between Newquay and Truro where there are higher proportions of young people making use of the night-time economy. The requirement for evening services in Newquay is further corroborated by a new partnership between the Council, Devon & Cornwall Police and First Bus which will provide a late-night bus service, funded by these partners (Including BSIP), over the summer and Christmas periods. Specifically targeted and ensuring the safety of residents and visitors to the area, the provision of the Newquay Night Bus aims to reduce antisocial behaviour and violence against women and girls.

Looking forward

Cornwall Council continues to reinforce its commitment to the public transport network by spending c.£43.3m a year providing public transport, school transport and the Truro Park & Ride. However, while absolutely necessary, this still presents an immense financial challenge for a rural setting. Cornwall keeps bucking the national trend and our priority is to keep the current network stable, enhance its quality and provide services that are a lifeline to local communities.

Recognising barriers to the growth of public transport in Cornwall due to its rurality, population density and demographics, the requirement for people to use the car for specific journeys will remain. However, as seen in the One Ticket section, growth in the proportion of passengers making longer journeys by bus is particularly encouraging and would suggest that, if delivered with the right conditions (frequency, connectivity, affordability), the connectivity needs of a growing number of passengers are being met.

The results of the Your Bus Journey survey 2023 demonstrates many positive results for Cornwall but also offered insight on the bus passengers' views on areas for improvement. A total of 74% of bus passengers in Cornwall are satisfied with connections with other forms of public transport (e.g. trains), in line with the overall level of satisfaction for rural areas (73%) but below the England average (76%).

Cornwall is at the centre of a revolution in the way that people move around, with huge investments in public transport with ground breaking initiatives such as the successful bid for a £50 million grant from the Government's Levelling Up Fund towards the £56.8 million Mid-Cornwall Metro (MCM) initiative. The project will help transform transport links in Cornwall. Residents will be able to better connect to employment, education (including higher education and university), and key services. Working with delivery partners GWR and Network Rail, the new coast-to-coast rail service will create a sustainable transport corridor through central Cornwall. It will improve the current links between four of Cornwall's largest towns: Newquay, St Austell, Truro, and Falmouth/ Penryn.

> "Cornwall is at the centre of a revolution in the way that people move around, with huge investments in public transport"

MCM will also provide further opportunities for public transport to be harnessed in a rural setting by increasing options for seamless travel and for bus travel to provide additional links between main and branchlines and our rural communities. When opportunities arise, our aim is to continue to work with operators to identify opportunities for the growth of existing services via introduction of increased frequencies, evening and Sunday provision and services where there is evidence of increasing demand (such as new housing developments and student accommodation).



One Standard

BSIP 2021 presented the evidence base around the standard of Cornwall's network. This section gives an overview of the standard of the bus network in relation to recent interventions.

Cornwall's aspiration is that buses will be simple and easy to use and have a consistent standard of service and infrastructure across the county. This section gives an overview of the impact of traffic on bus operations, local bus reliability, the fleet and wider infrastructure provision .



Bus Operations

Traffic Levels

Traffic levels in Cornwall increased by over 43% between 2000 and 2019. Lockdown had a considerable impact on traffic levels during 2020 but had returned, by 2023, to just 2% under pre-lockdown levels. The rise of car use creates increasing strain on the rural road network and key arteries in the county; with the addition of seasonal holiday traffic further exacerbating the situation, impacting both bus journey times and reliability. During the peak summer months, Cornwall experiences, on average, a 12% increase in traffic levels due to the impact of tourism and visitors to the county. Such levels create difficulties across the network and, most notably, in popular tourist locations.

High car use and increased traffic are key factors that contribute to poor network reliability. Bus reliability and punctuality are key concerns for operators and Cornwall was awarded BSIP funding to help address specific corridors and introduce bus priority measures.

Reliability

Service reliability remains a key issue for Cornwall Council and the bus operators to continue to address. BSIP 2021 detailed the factors impacting reliability in Cornwall (variations in congestion, streetworks and road traffic collisions) and these remain, the impact of streetworks playing a very significant role in the reliability of services over the last two years. Long term works to dual the A30 (due to complete this year) have severely impacted the highways network and bus operations, causing congestion, road closures and diversions. Cornwall's bus network reliability is now at 71% for 23/24 and, whilst this is an improvement on 22/23 (67%), this must improve if it is to instil confidence back into bus users and potential passengers. In the Your Bus Journey survey only 58% of passengers considered bus reliability in Cornwall good. Although slightly higher than the national average (56%), this provides significant evidence that addressing reliability is a core priority for the Council and its operators.

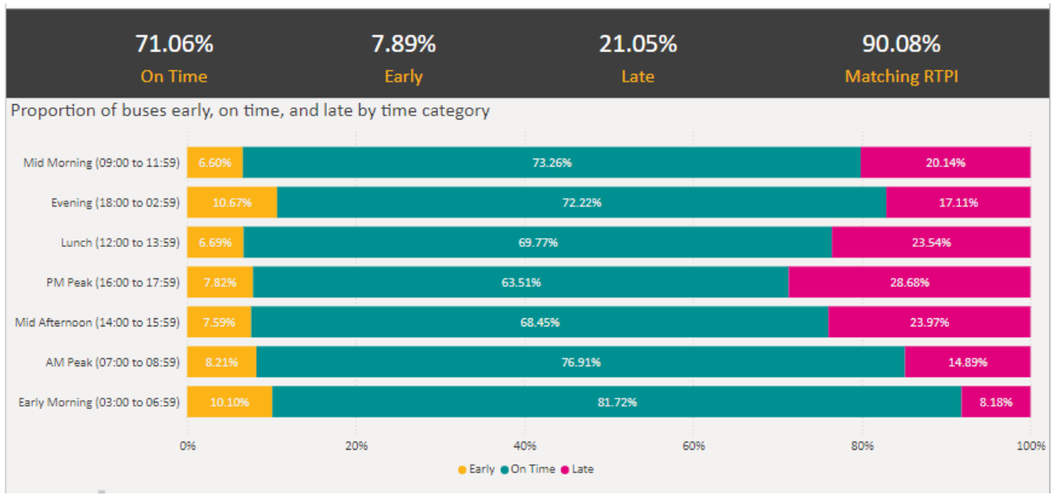


Fig 11: Local bus service reliabilty 2023/2024

Bus Priority

Cornwall's BSIP funding for bus priority improvements on busy bus corridors was aimed at improving journey time reliability, bus operations and efficiency. Work is underway to deliver capital improvements on the A390 in Truro, Falmouth-Penryn corridor and in Camborne- Pool-Redruth. These improvements are being delivered using a sustainable corridor approach, utilising funding from active travel where available to deliver coordinated interventions that jointly benefit bus users, cyclists and pedestrians. This will involve sections of bus and cycle lanes, easier access to bus stops for pedestrians, crossing points and traffic signal priority to ensure that buses are given priority at key junctions.

With the successful bid for BSIP, a targeted approach for infrastructure improvements has been implemented on key corridors and at strategic sites in Penzance and Liskeard, ensuring that the BSIP is able to improve transport infrastructure from the east to the far west of the county. A combination of junction changes and lining restrictions at Penzance Bus Station aim to improve access to the bus station for services and priority from the site for departing vehicles. In addition, improved footway connectivity plans are to be incorporated facilitating better access for customers between the town and the rail and bus station.

Large-scale bus priority schemes in a rural setting can be a challenge due to spatial limitations and the limited frequencies of services that may benefit. More localised issues stemming from inconsiderate parking blocking access to residential areas often cause severe delays to services, negatively impacting the performance of the network. The Council's Transport and Highways teams work closely to address these issues.

One such scheme involving a revision to road layout, addressing parking and access, received positive feedback from the local bus operator in the week following its inception:

> "**.....I am pleased to say we are already seeing a positive impact.** Drivers are reporting a much safer passage around the estate, especially with the junction and road widening in the worst places. .....Now we're looking forward to the next huge improvement, which will be the new parking restrictions."

Infrastructure & Technology

The Council is maximising wider funding and linking with other development opportunities, as exemplified in the Liskeard Cattle Market. This site, with a BSIP-funded new bus interchange at its heart, will receive a complete uplift, with new working spaces aimed at attracting business to the area, a new council building and combined GP surgery. BSIP funding will directly improve access to this new economic space.

Investment in Cornwall's roadside infrastructure is seen as a priority for the Transport for Cornwall partnership. Establishing a strong Transport for Cornwall presence and a high standard of bus stops and interchanges with appropriate facilities – shelters, flags, timetable information, RTPI – is considered a fundamental step in attracting customers and improving the appeal of bus travel.

Cornwall Council currently owns 4 bus stations which are leased to operators. An additional 3 bus stations are owned and operated directly by Cornwall's bus operators. There are currently c.6000 bus stops, of which c.3000 have some form of infrastructure. A rolling programme of improvement, undertaken on a route-by-route basis has taken place in recent years. Whilst all stops are correctly branded, there are many stops with mixed provision of facilities – some simply have a pole and flag, with others benefitting from passenger waiting shelters with RTPI. The remaining c.3000 bus stops, in rural areas are generally classed as hail and ride locations and many of these have little or no infrastructure.

The continued investment in the RTPI system over the past few years is a key feature in helping to enhance the bus product to customers by enabling live bus journey information to be made available. The electronic RTPI signs have the ability to display the bus times, destinations and service numbers of successive buses which are due to arrive at the stop. The Council continues to progress the roll-out of further RTPI at key stops across Cornwall. This is considered using the Section 278 and Section 106 funds and the Council's capital budget.

Shared Operator Facilities

The redevelopment of Longrock Depot, also funded by BSIP, is set be an innovative approach to partnership working in Cornwall. The site is currently occupied by two of Cornwall's largest operators, along with the Council, but the facilities are insufficient to support a modern bus fleet that is focused on partnership working. This new shared operator facility will benefit from rationalised routes of access to the site, removal of internal boundary walls, provision of new shared bus operator facilities (fuelling, bus wash, training and staff welfare) and prepare the site for future potential development related to improving the transport depot for bus operators e.g. electric charging depot infrastructure.

Technology continues to be an enabler for addressing reliability issues, with strong partnership working between the internal teams in Cornwall Council and bus operators for testing traffic signal priorities for buses. Regular consultation and engagement with operators takes place and helps to identify pinchpoints on the network and deliver targeted interventions.

Bus Fleet

Following investment in the fleet in recent years, Cornwall's local bus network is operated by over 190 lower emission buses. This has resulted in the average age of Cornwall's local bus fleet being 7 years old, with the supported fleet average age sitting at just 4 years old – a significant achievement for a rural county.

An Ultra-Low Emission Bus (ULEB) Strategy that identifies a pathway to introduce ULEBs to the local bus network in order to address Cornwall's carbon neutral goal has been developed. This fed into the Zero Emission Bus Regional Areas 2 (ZEBRA 2) bid that Cornwall, and a joint bid with Plymouth City Council, were successfully awarded funding for earlier this year. The ULEB Strategy also identifies future opportunities for the roll out of alternative fuel vehicles at key locations optimal to network operations.

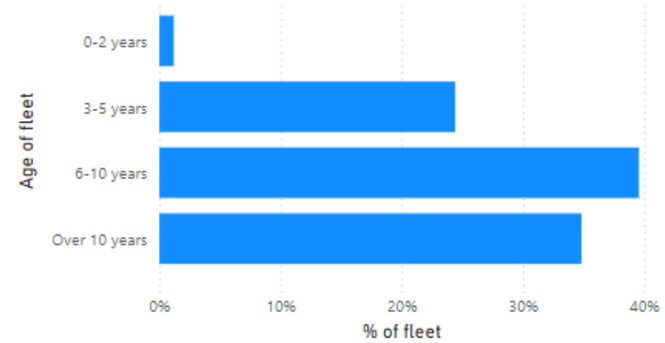


Fig 12: Age of local bus fleet

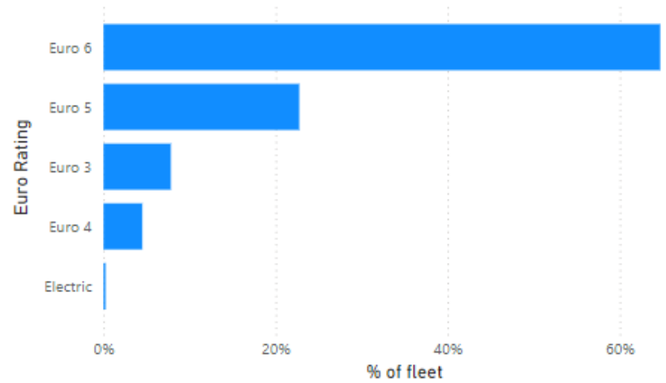


Fig 13: Euro Emission Rating of the Local Bus Fleet

*Electric entry above is a 7 seat vehicle

Looking forward

The expansion of Traffic Signal Priority (TSP) schemes that give bus services priority at key locations is central to Cornwall's bus priority plans and a countywide programme for TSP is an aspiration.

Where the introduction of bus lanes is not possible due to reduced road space, technology will be the chosen solution to allow late-running buses to flow. The aim is to ensure that opportunities for buses to be delayed are reduced, and that journeys made by buses are more comparable in time with car journeys, if not quicker in certain areas. Continued close working with highways and parking teams to address concerns over efficient use of road space will be prioritised.

Road works continue to provide a significant challenge, especially in residential areas with limited road space to be negotiated. There are already strong links with utilities companies, Highways England, internal teams and other parties, and the streetworks permit system in place is in accordance with the legislation. However, there is an opportunity in 2 years' time when the road classifications for embargoes are updated to reconsider how bus routes fit within the spatial planning for street and road works. From a policy point of view, the Council will review internal protocols to create awareness of the Local Transport Plan and the modal hierarchy and how this needs to be adopted by all. If road works typically maintain access for pedestrians, the Council aims to ensure that this can incorporate cycle journeys and buses. There will be continued investment in systems and data sources to demonstrate and address the impact of road works on bus service reliability.

As service reliability is such a key concern, highlighted by performance data and through the customer research, the Council and operators consider this a key priority to address and improve going forward. This will be the focal point of regular operator meetings with action planning and monitoring remaining in place to track improvements.

The enhancement of Cornwall's bus infrastructure is seen as a targeted intervention to support modal shift and make it easier and safer to reach bus stops by walking and cycling, including for those with impairments. As work continues towards achieving the aspiration for One Standard, the Partnership wants to ensure that the customer experience is further enhanced and has an ambition to upgrade infrastructure and embed the latest technology (RTPI & electronic bus timetable information at stops) for the benefit of passengers. There is a strong desire to standardise the offer at bus stations in terms of facilities, waiting areas and shelters - making them fit for purpose and our future network demands. Bringing all bus stops up to a basic standard and delivering a main stop in each village that has a shelter and RTPI is vitally important to supporting the connectivity of our communities and an investment that needs to be made to meet the needs of passengers. Further, the Partnership seeks to work with partners and improve accessible information for people with impairments to ensure equity of access to the bus network.



Transport Strategies for specific towns are being progressed and the Council and operators will work with local communities to ensure that consideration for public transport is at the core of future plans. Further, that bus stations, stops and shelters are fit for purpose, at the right locations, and provide the facilities required to improve the customer experience and bring more people to think 'bus first' when planning their journeys. This will also be picked up through ongoing work with schools to ensure that a behaviour change programme is in place to reduce traffic and congestion at peak times while growing patronage on the bus network; the use of mobility hubs and interchanges as school transport hubs is also an ambition.

With Longrock Depot being a starting point, the Cornwall Council is now embarking on a project to review depot facilities utilised by the Council and its strategic partners (such as Highways, Waste, transport operators and public car parks) within Cornwall so that locations can be optimised for shared facilities in the future with regard to energy usage, carbon impact and fleet optimisation. The aim is to ensure that the right depots are available at the right locations with the facilities that enable opportunities for co-location and efficiencies.

Cornwall's bus operators have supported the Council's development of its ULEB Strategy and pledged not to purchase new diesel vehicles from December 2022 with aim of having a full zero emission bus (ZEB) fleet by 2035. The ZEBs will make a substantial contribution to kickstarting the decarbonisation of the public service fleet in the County and the delivery of the Council's priority outcomes.

Following the award of ZEBRA 2 funding earlier this year, Cornwall's first zero emission buses will be introduced to Cornwall's fleet in 2025. These projects will introduce 8 x and charging infrastructure to the Truro Park & Ride and Falmouth Town Service. In partnership with Plymouth City Council, Cornwall was also successful in a joint bid to electrify Go Ahead's Plymouth (Milehouse) depot. This will see 6 x ZEBs entering service in south east Cornwall.

The arrival of these vehicles will provide much-needed local experience of electric bus operations for Cornwall's operators, particularly the smaller operators who do not have the same support that the national group operators have. However, the TfC partnership approach will ensure that this experience and expertise is available to all as a learning opportunity.

> "Cornwall's first **zero emission buses** will be introduced to Cornwall's fleet in 2025."



One Timetable and One Brand

BSIP 2021 gave a detailed overview of the information available and the vision for the development of a single brand. This section provides an update in relation to recent interventions in this area.

Transport for Cornwall brand

Cornwall's bus network is unique; the mix of commercial routes and routes that require support from the Council in order to be financially viable and continue to deliver connectivity in a rural area are seen quite differently by the public. The Transport for Cornwall (TfC) partnership is developing a brand strategy to position TfC as a connector of communities, people and places – a brand that represents a Cornwall with public transport at its heart.

With the introduction of interoperability and 'Any Ticket, Any Bus' in January 2022, it became a priority to ensure that passengers in Cornwall would understand this as a unified offer, available across Cornwall's operators. With the "making" of the Enhanced Partnership in Apr 2022, an extensive piece of work has been undertaken to develop the standard required for on-bus branding and integrated roadside information, bus timetable booklet, network guides and maps - allowing the public to understand that Transport for Cornwall provides all the information needed about using the bus network in Cornwall, all in one place.

Availability of information

Operators currently have free apps available for download providing customers with the ability to plan journeys, access real time information and use live tracking to track buses. These apps also allow customers to purchase period pass tickets.

With the introduction of the suite of integrated information, public transport has become easier to understand and use. Building on the very popular integrated timetable booklet and the countywide map, progress has been made to integrate roadside information so that customers have one coordinated display, along with a QR code that links to the existing Transport for Cornwall microsite to provide further information.

Marketing

Recognising the importance of portraying public transport positively and in a way that these messages are visible and relatable is the first step to attracting attention and having people 'tune-in' to public transport. Engaging marketing and promotional campaigns are a key ingredient in the delivering the benefits of public transport to a wider audience.

To this end, on behalf of Transport for Cornwall, Cornwall Council has engaged a marketing agency to carry out marketing, communications and engagement activities going forward. The Council and operators agree the annual marketing plan, target audiences and behaviour change strategies to promote wider awareness of the bus network in a way that will resonate with its markets; this is essential to be able to reach the various sectors (such as residents, commuters, tourists).

A huge step for TfC, this work is included within a Memorandum of Understanding between the Council and the two largest operators who have each committed funding and pooled resources to deliver this integrated approach to information provision and simplifying the offer for the customer. This innovative approach is formalised further through a specific EP Scheme for Marketing which is in the process of being adopted.

Looking forward

Following the introduction of the Transport for Cornwall brand, work is underway to make sure that the public can connect with the brand and understand more about what TfC can do to help them in their everyday lives. An evidence-led approach to delivering behaviour change is a key factor in driving real, long-term changes in behaviour.

The use of the Transport for Cornwall brand has evolved over recent years, the visual identity has been steadily rolled out across bus interchanges, fare and timetable information, marketing, core service announcements (e.g. route updates) and vehicles. TfC branded fares and general bus promotions have taken place at significant scale since the start of the Bus Fares Pilot in April 2022 and while recent focus group work has revealed that recognition of the TfC brand is strong, people's understanding of what Transport for Cornwall is/does and its value to those who visit, work and live in Cornwall needs further work. Therefore, the forthcoming brand strategy deployment over Summer 2024 aims to boost this and place TfC and its brand values firmly in the public domain, reinforcing its position and the benefits it provides to the community.

Also over the Summer, the Transport for Cornwall combined app and website will launch, promoted by a product launch campaign encouraging people to download the app and receive full bus journey planning information and ticket retail in one place. Starting with the two main operators, the app has the ambition to be the single point for information for buses, Beryl bikes, rail and other modes of transport.

The roadside information will continue to evolve as processes are refined between operators to improve the data exchange of timetable information. As the new TfC website/app is launched, the QR codes that currently feature on roadside information will link to live bus tracking available on the new TfC platform. While this information will be available online for access anywhere, these specific links will ensure that at all stops with physical infrastructure, customers have the ability to directly access live bus data – a further step forward in confidence building in the network.

The MoU and EP Scheme for Marketing will evolve based on feedback to the brand strategy and marketing campaigns planned for the year ahead. This is an exciting area of work that is able to respond to passenger growth and demand and, by working together, collaborate on joint communications that can drive real changes in travel behaviour.



Summary

This section draws together insights that inform the current state of the bus network. This insight is then used to inform future ambitions and actions in the following sections, such that they are targeted in the areas of greatest need and where they will have most impact. The following strengths and weaknesses analysis captures and summarises the main issues in line with local and national objectives.



Performance of Cornwall's current bus network against the ambitions of the National Bus Strategy and BSIP

National Bus Strategy ambitions

- Cheaper
- Easy ticketing

Cornwall BSIP

Workstream

- **One Ticket**

Ambitions

- Seamless travel
- Fares clear and simple, offering good value
- Ticketing easily understood and simple to use across the network
- More affordable travel for those who need it

Strengths

- ✔ Consistent range of tickets available that can be used across the network, regardless of operator
- ✔ Tap and cap payment available
- ✔ Discount good value fares as a result of Bus Fares Pilot and Government's £2 fare cap
- ✔ Consistent fares discounts for all under 19s
- ✔ Ticket 'bundles' offer further discounts compared to individually priced tickets
- ✔ Free travel for care leavers
- ✔ Data held for the delivery of the Bus Fares Pilot is gives a detailed insight into ticketing product and travel behaviour
- ✔ The proportion of fare-paying passengers has increased through the delivery of the Bus Fares Pilot and £2 Bus Fare Cap Grant, improving the sustainability of services

Weaknesses

- ✖ The best value period tickets require high upfront payment
- ✖ Lack of ticketing products aimed at group travel

Performance of Cornwall's current bus network against the ambitions of the National Bus Strategy and BSIP

National Bus Strategy ambitions

- More frequent
- More comprehensive
- Better integrated

Cornwall BSIP

Workstream

- **One Network**

- Network simple to understand and convenient
- Extensive network of directly routed services offering attractive levels of connectivity and availability
- Well-planned (co-ordinated) network that maximises travel opportunities and provides confidence to users
- Services that are increasingly commercially viable

Strengths

- ✔ Extensive network
- ✔ Existing Park & Ride provision
- ✔ For the type of area, relatively good levels of service (commercial and supported), including evenings and Sundays
- ✔ Strong support for bus by Cornwall Council
- ✔ Significant network of supported services
- ✔ Strong patronage compared with other rural areas and exceeding pre-pandemic levels
- ✔ A greater amount of data is shared by operators and held by the Council giving improved insight into operation and performance
- ✔ Large number of visitors provide potential demand
- ✔ Planned growth could increase demand for bus
- ✔ Potential to convert car journeys to bus in Truro and towns
- ✔ Strong partnership working with collective desire to achieve improvements
- ✔ Community transport responding to local needs

Weaknesses

- ✖ Dispersed settlement patterns and travel demands
- ✖ Lack of co-ordination between operators on certain corridors
- ✖ Public engagement indicates people want frequent services and direct buses to more destinations
- ✖ Lack of early morning and late evening buses
- ✖ Specific tourist-related services not always integrated into overall network



National Bus Strategy ambitions

- Faster and more reliable
- Better to ride
- More understandable
- Greener



Cornwall BSIP

Workstream

- **One Standard**

Ambitions

- Buses simple and easy to use, offering a consistent standard
- Positive experience of bus travel – high quality, convenient, pleasant, comfortable, reliable
- Efficient and effective bus operations, supporting wider policy objectives

Strengths

- ✔ Relatively new bus fleet
- ✔ High levels of user satisfaction
- ✔ Funding secured for introduction of zero emission buses

Weaknesses

- ✖ Congestion hotspots
- ✖ Worsening traffic situation with planned growth
- ✖ Reliability issues from congestion caused by visitor traffic and impact of large events
- ✖ Variable provision and quality of bus stop infrastructure
- ✖ Public engagement shows lack of confidence in using the bus

Cornwall BSIP

Workstream

- **One Timetable and**
- **One Brand**

Ambitions

- Bus viewed positively by all and as a desirable way to travel
- Bus network is stable, visible and widely understood
- Customers understand the Transport for Cornwall brand and what it represents

Strengths

- ✔ Transport for Cornwall (TfC) brand and marketing well established, including TfC website
- ✔ Joint council and operators group to oversee and direct information and marketing provision
- ✔ Comprehensive bus network map and timetable booklet available
- ✔ Real time information displays at over 300 stops
- ✔ 2300 TfC-branded bus stop flags and 2400 timetable cases at bus stops
- ✔ Coordinated service change dates
- ✔ Single Bus Passenger Charter covering whole network
- ✔ Work to commence on encouraging travel behaviour change and use of more sustainable modes

Weaknesses

- ✖ Uncoordinated route numbering



Section 3 | **Improvement programme - since BSIP 2021**

3

The following table details the improvements made in the last two years since the original BSIP submission and formation of the Enhanced Partnership, set against the One Public Transport System for Cornwall workstreams and ambitions (columns 1 & 2).

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress since October 21	Future actions
One Ticket	Seamless travel – so customers don't need to worry and can trust that they get best value. This means: • Fares that are clear and simple, widely known and offer good value • Ticketing products that are easily understood and simple to use across the entire public transport network • More affordable travel for those that need it	Interoperability - operators accept one another's tickets	Achieved interoperability January 22. Cited as a 'gamechanger' in our customer research, this has enabled over 1m interoperable journeys since inception.	Operators will continue interoperability as a BSIP 2024 commitment.
		Child fares extension to under 19s	Interoperability in January 2022 also saw operators adopt the same age range for child fares (under 19s) and level of discount given (50% adult). These fares are maintained in the current shadow fares that sit behind the Bus Fares Pilot.	Operators will continue child fare parameters as a BSIP 2024 commitment.
		Bus Fare Pilot (BFP)	Delivered from April 2022 – initial one third discount on fares. Marketable headline fares at launch led to noticeable product shift from sgl/rtn to multi-journey day tickets. Has been operating alongside the national £2 Bus Fares Cap Grant since January 23.	Continue to deliver good value fares discounts while BFP funding is in place.
		Tap & Cap	In July 2022 as part of the BFP, contactless Tap & Cap payments were introduced as a quick and easy way to pay for Adult Day & Weekly tickets.	Operators will continue Tap & Cap as a BSIP 2024 commitment, extending its roll out to appropriate products in line with the P&P Strategy (below).
One Ticket (cont.)		Care leavers' free travel	Achieved through the Enhanced Partnership and funded by Cornwall Council, free bus travel for care experienced young people under 25 yrs old was launched in June 2023. Nearly 5,000 journeys were made in the first 10 months of the scheme, providing vital social, employment and educational links for this cohort.	The Council and operators will continue the care leavers' free bus travel as a BSIP 2024 commitment.
		Volunteering 'time credit' exchange for free bus travel	Transport for Cornwall has become a Recognition Partner of the Tempo Time Credits charity to recognise and reward the valuable work that its volunteers undertake across the community. Volunteers can exchange volunteering time credits for bus tickets to assist access volunteering opportunities or enjoy at their leisure.	Operators will continue time credit exchange as a BSIP 2024 commitment.
		Active Travel Social Prescribing	Cornwall Council was awarded funding in 2024 to reduce health inequality and make active lifestyles more attractive and achievable. Bus operators have agreed to work in partnership to facilitate the 'prescribing' of free bus travel to enable access to active travel opportunities, supporting adults to change and embed sustainable travel into their lives.	Operators will continue participating in the social prescribing scheme as a BSIP 2024 commitment.
		Pay-As-You-Go (PAYG) ticketing on rail	In November 2023 PAYG smart ticketing was introduced in west Cornwall funded by Cornwall Council and delivered by GWR. This scheme allows passengers to tap on and off rail journeys with their smartcard and be charged the best value fare for the journey made.	With an allocation of funding from Cornwall's Mid-Cornwall Metro Levelling -Up Fund award, PAYG ticketing will be extended up to and including Plymouth in February 2025. It is hoped that this will provide the foundation for bus/rail multimodal ticketing in the future.

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress since October 21	Future actions
One Network	• An extensive network of punctual services, offering attractive levels of connectivity and availability. • A well-planned network that maximises travel opportunities and provides confidence to users. • Services that are increasingly commercially viable and offer a realistic alternative to the car for some journeys. • Services that seamlessly link with other modes, enabling better choice and more opportunities for travel.	Bus service adjustments / Network review and consolidation	The Council and operators have worked together to keep the network as stable as possible through a period of funding uncertainty in the wake of the pandemic. An evidence-led approach has been taken to keeping changes to a minimum and continuing to offer effective and much-needed transport links. Where possible, route adjustments have been made to offer better connections between bus-bus and bus-rail and as a way of addressing some reliability concerns.	Operators are committed to continuing to develop and maintain a connected and integrated network that offers reliability and confidence in travel. Reliability is seen as key to continued patronage growth and future focus will be on improving the current customer offer and experience, linking in with planned BSIP capital schemes to improve journey times and encourage modal shift.
		*Alternative delivery models for rural transport	New approach to delivering rural transport launched in April 2023 with new BSIP funded services operated by Saltash Red Bus (SRB). This partnership between SRB and Go Cornwall Bus (GCB) sees GCB provide support for service registration, planning and the supply of ticket machines while SRB provide the vehicles and drivers that facilitate vital links for extremely rural communities.	Long term financial sustainability is the challenge to this project as the vehicles operating have limited seating (16 seat minibuses) so growth is limited. Services have reduced and been amalgamated from seven at outset to four for 2024 based on uptake. Evidence would indicate that although these links are vital to isolated communities, usage and income is limited by the vehicle size and high level of ENCTS card use. And unlikely to ever be fully sustainable.

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress since October 21	Future actions
One Standard	• People choose to use the bus as the whole experience of bus travel is positive and of high quality – convenient, safe, pleasant, comfortable and reliable. • Bus operations are efficient and effective and support wider policy objectives (decarbonisation; economy; health and wellbeing). • Buses will be simple and easy to use, offering the same standard of service for residents across Cornwall supported by high quality infrastructure. • A zero emission fleet operating on Cornwall's network. Depot strategy including land for parking of vehicles. Alternative fuel vehicles require additional infrastructure requirements and land space.	Encouraging modal shift and integration across public transport	With GWR a key Transport for Cornwall partner, branded wayfinding signage between rail stations and bus stops to ease navigation at interchanges. On-board audio announcements directing rail passengers to onward bus connections and to www.transportforcornwall.co.uk for further information now make integration options easier for passengers.	Ongoing commitment to continue the roll-out of station and interchange wayfinding and improvements. This will include continued investment in upgrading stops (hardstanding, footways, dropped kerbs, bus shelters, etc.) making them more accessible, better connected with up-to-date information provision and branding.

*BSIP funded schemes are denoted with an asterisk.

Case Study:

Tempo Time Credits



Transport for Cornwall is a Recognition Partner of Tempo Time Credits – a charity that rewards registered volunteers for their community volunteering efforts. By allowing volunteers to exchange volunteering time credits for bus tickets, TfC is making a difference to those dedicating their time to help others.

Sue, Volunteer at St. Ives Community Orchard: "I'm a big fam of public transport. Our roads are so crowded in Cornwall and it is so much better for the environment. I have used Time Credits a few times for day tickets to go out for a trip somewhere nice. We have been to Mousehole and….Sennen Cove. We also used the tickets for my husband to go to hospital appointments."

Helen, Volunteer at Newquay Orchard: "I have used my Time Credits to save money on public transport……I have used the bus for days out with my partner……This was a fantastic experience that we might not have had the chance to enjoy without the Time Credits."

Workstream	Ambition	Description	Progress since October 21	Future actions
One Timetable and One Brand	• The bus is viewed positively by all and seen as a desirable way to travel. • The bus network is reliable, stable, visible and widely understood – with users and potential users able to plan all elements of their journey before they travel including services, fares and real-time information. • Information provision is consistent and easy to understand – customers know how to find out about buses. Customers understand the Transport for Cornwall brand and what it represents, and what they can expect through the Customer Charter.	*'Network' recognition via deployment of Transport for Cornwall (TfC) branding	Full TfC livery has been deployed on GCB's Council-supported services and TfC logos are displayed on commercial services operated by First South. All roadside infrastructure and information proudly features the TfC brand, along with marketing materials, to ensure that passengers understand what services, facilities and products are available to them as part of TfC.	Wider deployment will continue with new campaigns designed to 'position' the Transport for Cornwall brand – better explaining to the public our vision and goals and how TfC impacts and relates to their lives.
		Agreed timetable change dates	Included in the Enhanced Partnership Scheme is the agreement of set timetable change dates per year – this has promoted stability for passengers and provided the foundation for the delivery of joint service information (see below).	Operators will continue to agree future timetable change dates as a BSIP 2024 and EP commitment.
		*Coordinated roadside timetable information	Progress has been made to integrate roadside information across operators, providing customers with a coordinated uniform display.	The Council and operators will continue to work together to evolve the roadside information and provide the best possible information experience when using interchanges and waiting facilities.

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress since October 21	Future actions
One Timetable and One Brand (cont.)		*Memorandum of Understanding (MoU) in place to deliver consolidated information, all in one place	All service information is now integrated across TfC operators: timetable booklet, bus and rail service map, roadside information, real-time passenger information (RTPI) and a TfC microsite. This has provided the foundation for the establishment of the MoU with operators which commits funding and resource to deliver combined service information and marketing, communications and engagement activities on an annual basis.	The Council and operators will continue to use the MoU to jointly fund these activities. Further, a new Enhanced Partnership Scheme for Marketing will be in place in Summer 2024 that details the ongoing EP commitment to this important workstream.
		*Marketing, Communication and Engagement Contract	On behalf of the TfC partnership, Cornwall Council procured a marketing agency in August 2023 to undertake marketing, communication and engagement activities to better establish the TfC brand and undertake marketing and behavioural change campaigns to encourage people to try the bus.	TfC brand strategy work and behavioural change campaigns are planned to launch in Summer 2024. Seasonal and targeted campaigns are also planned throughout the year ahead.

*BSIP funded schemes are denoted with an asterisk.



Workstream	Ambition	Description	Progress since October 21	Future actions
Customer Focus	Ensuring that the customer experience is at the heart of the TfC delivery	Research to better understand our customers and potential markets	Cornwall's programme of focus group activity continued in 2022 and 2023 with research undertaken to understand the impact of the BFP and public transport improvements. The groups conducted in 2023 were informed by the DfT's Segmentation Tool and sought insight into people's use of and attitudes towards the bus as well as specific interventions delivered over the last two years. The outputs of these groups have supported the direction of the Product & Pricing Strategy, TfC brand strategy work and informed the development of the BSIP 2024.	Cornwall is committed to ensuring that both user and non-user research is undertaken to inform delivery across public transport. It is widely recognised that passengers in rural areas have specific transport needs that are not always reflected in national research, making a commitment to ongoing local research vital in planning and delivering our network and services.
		*Participation in Transport Focus 'Your Bus Journey' survey	Cornwall values the input of Transport Focus to its Enhanced Partnership Steering Group and is supported by the valuable insight provided to champion the customer in the delivery of the network. Through the Transport for Cornwall Partnership, the Council and bus operators committed to jointly fund Cornwall's participation in the Your Bus Journey survey in 2023 in order to monitor the satisfaction of passengers and, through benchmarking, understand this performance in the context of the national picture.	Continued jointly funded participation in the Your Bus Journey survey and use of the results to inform the evolving Bus Passenger Charter and focus for future priorities.

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress since October 21	Future actions
Customer Focus (cont.)		Working with Sustrans to promote active travel and public transport	The Council has a contract in place with Sustrans to undertake active travel and public transport promotion and this has led to the delivery of Junior Life Skills training (joint service initiative involving training on using the bus) guided walks using the bus at either end, workplace sustainable transport promotion and coordinated marketing activities with the TfC event delivery team.	Continuation of the partnership work to deliver combined active travel and public transport promotion to the public via workplaces, schools and public events.
		Independent Travel Training (ITT)	The Council has been working closely with schools to establish a new ITT programme. The aim of which is to establish ITT as a core part of the school curriculum, aligning to the outcomes of the young person's Education Health & Care Plan – helping to prepare students to travel independently on public transport as they progress to further education and into the workplace.	Roll-out of the programme will be expanded and embedded at more schools, increasing the number of students benefitting from the training. Already being delivered as part of the Council's own offer but we would like to secure funding for delivering an innovative and exciting learning opportunity to small cohorts of students. This would be focused on the planning and experiencing a journey via public transport under the guidance of school staff (via a "train the trainer" approach. Students will have an opportunity to interact with Members of the Transport Coordination Team and the Local Bus Operators, (including visits to the network control rooms) to build confidence and knowledge of the public transport network, in a view to encourage behaviour change .

*BSIP funded schemes are denoted with an asterisk.

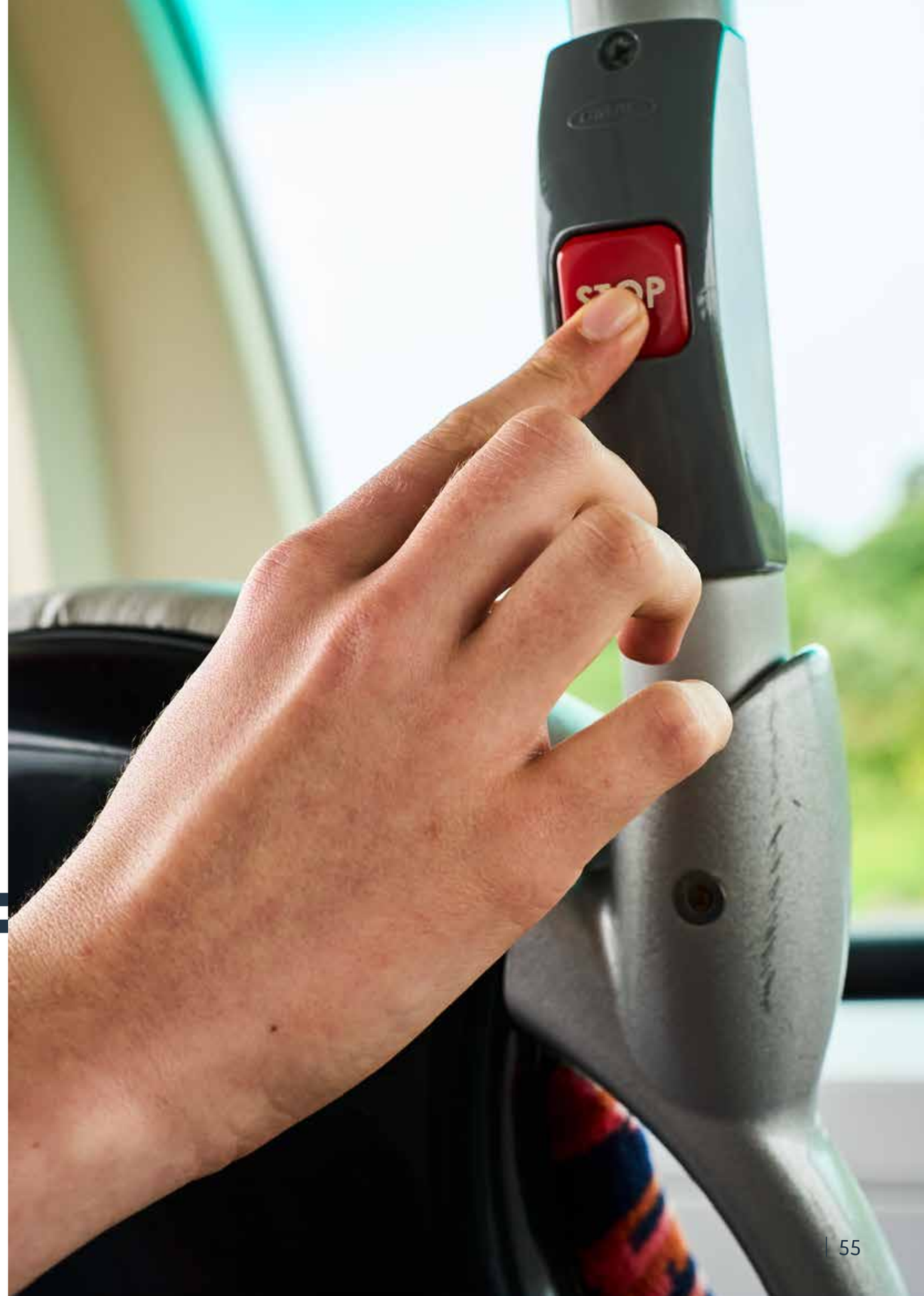
Case Study:

Independent travel training

Working together, the Careers Hub and Transport Coordination Service help organise trial trips on the public transport network, focusing on journeys to further education providers, transport hubs and potential employers. Transport for Cornwall plays an active part in the experience with Go Cornwall Bus providing students with a tour of Truro Bus Station and their Network Control facility where the bus network is managed. The aim of this project has been to establish independent travel training as a core part of the school curriculum that aligns with the agreed outcomes of the young person's Education Health & Care Plan to help prepare students to travel independently on public transport as they progress to further education and into the workplace.

So far, the programme has been established across Cornwall's Special Partnership Trust main sites and as well as for some students with SEND at mainstream school settings. The evidence so far shows that the programme has been very well received by students. Testimony from school staff involved in the programme has also been very positive, showing the benefits of helping facilitate a programme that empowers the trusted education professionals who work with students on a daily basis to deliver the training and support with the oversight and direction required from the Careers Hub Team.

It is our priority that this programme will continue to be rolled out and embedded at more schools so that increasing numbers of students will benefit. The Transport Coordination Service will monitor feedback and outcomes to observe where participation in the scheme helps students to move to more independent forms of travel when engaging in further education.





Section 4 | **Improvements programme 2024 - 2025**

4

The following table details the delivery focus for 2024/25. As this work relates to the original BSIP (2021), these are set against Cornwall's One Public Transport System for Cornwall workstreams and ambitions (Columns 1 & 2).

*BSIP funded schemes are denoted with an asterisk.

Workstream	Ambition	Description	Progress for 2024-25
One Ticket	Seamless travel – so customers don't need to worry and can trust that they get best value. This means: • Fares that are clear and simple, widely known and offer good value • Ticketing products that are easily understood and simple to use across the entire public transport network • More affordable travel for those that need it	***Young Person's (19-25 years) Discounted Bus Travel scheme** - Acknowledging that sustainable travel behaviour is a habit formed from a young age, the young person's discount will provide discounted bus travel on period pass products, giving better value travel to young people and locking in loyalty to bus for longer. Options have been identified for the scheme implementation which consider the commercial retention of the scheme once the BSIP funding has ceased.	• Scheme launch in Summer 2024. • Countywide multimedia promotion. • New TfC app will provide age verification. • Scheme to benefit from launch of TfC web/app.
		Completion and early implementation of the Product & Pricing Strategy – A Product & Pricing (P&P) Strategy is being developed to outline the approach that the Council and operators should take to support a sustainable exit from the Bus Fares Pilot (BFP). It is imperative that the exit is considered in such a way as to protect the patronage growth achieved since 2022.	• Agree the P&P Strategy outcomes with operators. • Commence implementation measures ahead of the end of the BFP funding in order to protect passengers and operators from the impact of any 'cliff-edge'.
One Network	• An extensive network of punctual services, offering attractive levels of connectivity and availability. • A well-planned network that maximises travel opportunities and provides confidence to users. • Services that are increasingly commercially viable and offer a realistic alternative to the car for some journeys. • Services that seamlessly link with other modes, enabling better choice and more opportunities for travel. • Services that meet the needs of the local community, acknowledging the vital role that the public transport network plays in a rural area	***Stabilising the existing network and to continue to promote community connectivity and enable accessibility and social inclusion** - Almost half of Cornwall's passengers rely on the bus network to access employment, education, health services and shopping as they have no other transport options. It is therefore vital that the existing network is protected to give the public confidence in the role it has in their daily lives.	The key priority is to ensure that the current network is stable and protected from the requirement to make service reductions.
		***Network Development –** Whilst protecting the existing network remains the top priority in relation to the bus network, where there are opportunities to support service enhancements, these will be considered on an evidence-led basis where growth is most achievable.	Currently funded service enhancements between Newquay and Truro and support for the Saltash Red Bus services which are a community-led initiative will continue this year.
		Improved collaboration with Cornwall Council Highways and Street Works teams regarding the impact of road closures - Road closures caused over 700 diversions to Cornwall's bus routes in 2023. While many of road closures are necessary works to improve the highways and to carry out emergency works, the timing and scheduling of works in a way that is considerate of bus movements as a priority has been embedded across the scheduling teams. Linked to the stabilisation of the existing network, it is imperative that the impacts of network disruptions are minimised and well-managed in order that customers can continue to receive a reliable service on which they rely.	Introduction of new software that will manage the publication of road closure notices to streamline the existing manual processes, enabling officers and bus operators to see consolidated works and plan ahead. (The outcome of an internal bid for funding for this software is awaited.)

Workstream	Ambition	Description	Progress for 2024-25
One Standard	• People choose to use the bus as the whole experience of bus travel is positive and of high quality – convenient, safe, pleasant, comfortable and reliable. • Bus operations are efficient and effective and support wider policy objectives (decarbonisation; economy; health and wellbeing). • Buses will be simple and easy to use, offering the same standard of service for residents across Cornwall supported by high quality infrastructure. • A zero emission fleet operating on Cornwall's network. • Depot strategy including land for parking of vehicles. Alternative fuel vehicles require additional infrastructure requirements and land space.	*Bus Priority works: • Truro A390 Corridor – Bus priority works are underway that will address specific pinchpoints on Cornwall's busiest bus corridor. Where relevant, Traffic Signal Priority (TSP) is being deployed to identified junctions to give buses a clearer path into and out of the city. Capital works to improve bus advancement along the corridor are also underway – these schemes will provide greater journey time reliability for passengers. Works to improve access to bus stops for pedestrians and cyclists and are also being progressed. • Falmouth-Penryn Corridor – A jointly funded initiative using BSIP and Active Travel England funding, works on this corridor will deliver a new section of bus lane along with junction revisions to improve bus, cycle and walking access along the corridor between the two towns. • Camborne A3047 Corridor - A series of interventions has been drawn up for this corridor which aims to improve pedestrian access and bus priority including the roll out of TSP at key locations.	Completion of scheme delivery and 'go live'.
		*Targeted infrastructure – This work package is developing pipeline bus priority schemes in Redruth, Camborne, Newquay, Penzance, Playing Place and St Austell. Where 'quick wins' (Traffic Signal Priority, revision of road markings/layout, etc.) have been identified and funding allows, interventions are being progressed to improve bus priority in these areas.	• Completion of scheme development and feasibility work. • Delivery of 'quick wins'.
		*Shared operator facilities - Redevelopment of an existing site at Longrock, nr Penzance where operators and the Council currently occupy separate areas. This scheme will bring operator sites together and provide shared training facilities, staff welfare, bus wash and re-fuelling facilities. The site will also be future proofed for electrification through the design of an electric vehicle layout plan.	• Completion of scheme delivery and 'go live'.

Workstream	Ambition	Description	Progress for 2024-25
One Standard (cont.)		***Connections & interchange –** A Connections and Interchange Strategy has been drafted, identifying opportunities to improve the connectivity of public transport across Cornwall. This will help people access public transport and interchange more easily between services. Specific work to deliver a new transport hub at Liskeard is being progressed as part of a multi-service development at the former cattle market site. This will provide a much-needed interchange for passengers with bus waiting and layover facilities	Completion of scheme delivery and 'go live'.
		Zero emission buses – Cornwall Council was successful with its ZEBRA 2 bid to introduce 8 x zero emission buses (ZEB) and charging infrastructure to the Truro Park & Ride and Falmouth Town Service. In partnership with Plymouth City Council, Cornwall was also successful in a joint bid to electrify Go Ahead's Plymouth (Milehouse) depot. This will see 6 x ZEBs entering service in south east Cornwall.	• Commencement of procurement activities for the ZEBs and required charging infrastructure. • Working with Plymouth City Council and Go Ahead to progress the joint scheme.
One Timetable and One Brand	• The bus is viewed positively by all and seen as a desirable way to travel. • The bus network is reliable, stable, visible and widely understood – with users and potential users able to plan all elements of their journey before they travel including services, fares and real-time information. • Information provision is consistent and easy to understand – customers know how to find out about buses. • Customers understand the Transport for Cornwall brand and what it represents, and what they can expect through the Customer Charter.	*Transport for Cornwall Website and App - Work is underway to launch a Transport for Cornwall (TfC) website/ app in Summer 2024. Bringing together bus journey planning and real time bus information for the first time and providing a single platform for interoperable ticketing retail, this is a key development for the TfC Partnership.	• Website/app launch in Summer 2024. • Accompanying marketing and promotional activities.

Workstream	Ambition	Description	Progress for 2024-25
One Timetable and One Brand (cont.)		**Promotion/marketing and behaviour change campaign work** - Marketing contract to improve public perceptions and make sure public transport is presented as a positive choice. Specifically targeting those with the greatest propensity to change their travel habits, behaviour change campaigns are being carefully planned and evidence-led. Overall brand work to 'position' the TfC brand in the public's view. This needs to create and maintain positive relationship with TfC, even for non-bus users. Short term, immediate targets are residents in areas where good frequency and connectivity levels make off-peak travel attractive.	• Campaign execution in line with agreed marketing plan • Communications and engagement work to build the TfC profile and translate the brand to the public
		***Improvement of roadside information and access** - Upgrading existing stops to improve access and information is critical to attracting more people to bus. The recent Your Bus journey saw Cornwall achieve a 76% passenger satisfaction rating with the bus stop and 72% satisfaction with the information provided at bus stops. While these compare favourably with the rural and England average scores, the importance of getting these basic elements right in order to attract more people to bus cannot be overlooked.	• Continued roll-out of upgrades to roadside information and improvements of access to stops.
Customer Focus	• Ensuring that the customer experience is at the heart of the TfC delivery	***Bus frontline staff training - 'Delight the Customer/TfC Ambassador'** – Frontline staff play a significant role in the delivery of the commitments made to passengers in the Bus Passenger Charter- they can be the difference between a good or a satisfactory journey experience. This accredited training will ensure that frontline staff have an understanding of how to 'Delight the Customer' and positively represent their part in the Transport for Cornwall Partnership.	• Gain course accreditation • Deliver training to all frontline staff

Bus driver recruitment and retention

Significant driver shortages have been experienced across the industry in recent years with operators finding it difficult to recruit and retain the staff required to deliver efficient bus operations. Huge efforts were taken in Cornwall by national operators to attract and train drivers and, while the situation was particularly challenging due to Cornwall's economy post-pandemic, the situation is currently much more positive with Cornwall's three group operators reporting that they are fully staffed for drivers. One operator is reporting a waiting list of applications in some areas.

Operators cite that this success has been due to significant investment in the employee proposition with commitments to salary, workplace culture and workable rostering, all improving the appeal of a becoming a driver.

Into 2024/25 Cornwall's operators will seek to maintain this position, proactively recruiting and monitoring retention trends. One operator has an ongoing campaign to increase the number of female drivers through the introduction of women-only training courses and open days.





5

Cornwall Council and its operators are committed to maintaining the current network and delivering this to a consistently reliable standard to meet customer needs and expectations. Securing the ongoing revenue funding required to maintain the existing network continues to be Cornwall's main priority. From here, investment in the incremental development of the network can be sustainably implemented and led by evidence of growth in demand and patronage.

Building on the improvements delivered through the strong partnership that has underpinned the first BSIP and Bus Fares Pilot, Cornwall's Enhanced Partnership is focused on ensuring that the future delivery of the network continues to maintain the passengers it has worked hard to attract and grow the patronage base further. Achieving a continuously high standard of delivery will be the operational focus going forward so as to reinforce the foundations for future growth.

Future capital spend will, in the main, be directed at improving the customer experience – upgrading roadside waiting infrastructure and interchanges, investing in the wider roll-out of targeted bus priority measures, real-time passenger information and the progression of multimodal ticketing.



National Bus Strategy Category

→ **Lower and simpler fares**

Title of scheme or proposal	Description
→ **Continuation of Bus Fares Pilot**	• The Bus Fares Pilot will continue to provide discounted travel across the network while existing Government funding is in place until March 2026. While this is not a BSIP-funded priority, the continued delivery of affordable fares that increase the attractiveness of the bus to new and existing users is critical to growing patronage, growing the network and helping to decarbonise transport.
→ **Young Person's (19-25 years) Discounted Bus Travel scheme**	• Young people are the bus users of the future and Cornwall recognises the importance of providing them with a positive and fulfilling bus experience in order to lock-in this positive travel behaviour, normalising bus use in everyday lives. It is important for Cornwall to be able to support the Young Person's Discounted Bus Travel scheme (commencing 2024) to a commercially viable product in the future.
→ **Targeted fares for those most in need**	• Given the high deprivation levels in Cornwall, opportunities will be explored to create targeted fares products for those most in need, enabling them more affordable access to public transport. The exploration of a scheme that may make bus travel more affordable for job seekers, for example, would seek to facilitate improved access to employment while embedding modal shift at a time where we understand people are more receptive to change.
→ **Concessionary Fares - maintaining discretionary scheme elements**	• Cornwall is committed to encouraging growth in concessionary travel, recognising how passholders use their passes for social activities, important in respect of people's health and wellbeing, access to healthcare, shopping and employment. Cornwall Council wishes to continue to offer a 24/7 scheme, above the statutory requirement, cognisant of the lifeline that ENCTS provides.

National Bus Strategy Category

→ **Ticketing**

Title of scheme or proposal

→ **Bus/rail ticketing**

→ **Devon and Cornwall bus ticket**

→ **Future ticketing measures**

Description

- Cornwall's aspiration for multioperator multimodal contactless tap on, tap off (TOTO) ticketing remains strong and much progress has been made towards this on both bus and rail. The Bus Fares Pilot introduced the TOTO technology on bus to facilitate contactless Tap & Cap in 2022. The delivery of Pay-As-You-Go smart ticketing on rail in west Cornwall in November 2023 (and the current expansion to the rest of the county, including Plymouth, by February 2025) will mean that Cornwall is in a strong position to develop an account-based bus/rail ticketing scheme. Preliminary discussions have been held with operators and scoping is underway.
- Recognising that many passengers have a requirement to travel across our borders for work, education, healthcare and leisure, there is a cross-border desire to develop a Devon & Cornwall Bus Ticket. This is likely to form part of a wider approach to multioperator ticketing in the south west being explored by the Sub-National Transport Body.
- Following the delivery of the Bus Fares Pilot (BFP) between 2022-2026, Cornwall is seeking the opportunity to ensure that fares and ticketing remain sustainable for operators and attractive to the public. A Product & Pricing Strategy is in development that will identify the ticketing reform required to exit the BFP and the products that are most likely to encourage further network growth and behaviour change.

National Bus Strategy Category

→ **Service level and network coverage**

Title of scheme or proposal

→ **Protecting and stabilising the existing network**

→ **Network development**

Description

- Through the use of BSIP Phase 1 and Phase 2 funding, Cornwall was able to maintain and develop its network, delivering patronage growth. Cornwall's highest priority is the ongoing protection of this network that has been so well protected with BSIP funding and is vital for its rural communities where public transport facilitates much-needed and relied-upon access to employment, education, healthcare and shopping.
- An evidence-led approach will build on the existing bus network, increasing frequencies and extending service operation through the evenings and weekends where newly initiated demand suggests growth is possible, and will consider housing and employment development needs from the emerging Local Plan - a specific focus will be applied to improving frequencies in Travel to Work Areas and relieving seasonal demand through pop-up Park & Rides. Longer-term network transformation will build from here, underpinned by the commitments and measures within the EP to deliver a future network that attracts and enables modal shift in the drive to decarbonise transport.



National Bus Strategy Category

→ **Accessibility and inclusion**

Title of scheme or proposal	Description
→ **Inclusive provision**	• To ensure Cornwall's public transport network is available to all, a programme of infrastructure upgrades to existing rural roadside waiting facilities ensuring connectivity to the bus stop is prioritised - kerb adjustments, crossing facilities, hard standing/footway at the bus stop, shelters, etc. Improvements will also be made to signage and wayfinding. Opportunities will be explored to provide assistance to help operators meet the new audio/visual announcement requirements on-bus from October 2026 and seek to include expected arrival times for route terminus points. The safety and comfort of all passengers is paramount, ensuring that they are well-informed during journeys will help to reinforce this.
→ **Independent Travel Training (ITT) offer and modal shift**	• Cornwall aspires to extend the existing ITT offer for students - planning and experiencing a journey via public transport under the guidance of school staff (via a "train the trainer" approach). Students will have the opportunity to visit the network control rooms to build confidence and knowledge of the public transport network, with a view to encouraging long-term behaviour change.

National Bus Strategy objective

→ **Waiting and interchange facilities**

Title of scheme or proposal	Description
→ **Bus stop improvement programme**	• A rolling programme of improvements will be undertaken in conjunction with our active travel workstreams on core and supporting routes - including bus shelter replacement, accessibility and walking links to stops and improved information provision at all bus stops and key interchange points. Bringing all bus stops up to a basic standard with a pole, flag and hardstanding and a main stop in each village with a shelter and RTPI are vital investments to support the network.
→ **Mobility hubs & station upgrades**	• Using the outcomes of the Connections & Interchange Strategy, mobility hubs will be established in line with our active travel strategy and school transport workstreams in key strategic locations. Further, bus station upgrades and capacity works will be carried out at our key bus stations - Newquay, Penzance and Truro.

National Bus Strategy Category

→ **Bus priority**

Title of scheme or proposal	Description
→ **Bus priority measures**	• A principle of continuous improvement in network management and provision of targeted measures that provide reliability and journey time improvements. Opportunities for bus priority will be explored on approaches to key towns where bus access/egress is hindered by congestion, junction capacity, signal sequencing, etc. and where the impacts of seasonal traffic are particularly significant. The Targeted Infrastructure workstream in the BSIP 2021 has identified schemes to implement in Newquay, Camborne and St Austell.
→ **Traffic signal priority**	• A rolling programme to deliver signal upgrades at identified sites and to include consideration of bus priority future site renewals/upgrades and wider transport/highway delivery.
→ **Other targeted measures**	• The penetration of bus into estates and communities is critical to the reliability of the service and ensuring equality of access. Targeted bus priority interventions are required at network pinchpoints, often due to obstructive parking and/or insufficient highway layout. A review of these concerns and delivery of solutions will provide confidence in the network, helping to restore and maintain journey time reliability.
→ **Roadworks coordination and management**	• Cornwall operates a permit system which helps to manage roadworks and their impact on bus service disruption. The introduction of new software has been identified as a solution to manage the publication of road closure notices, streamlining the existing manual processes, enabling officers and bus operators to see consolidated works for forward planning. This will be a significant boost to ensuring buses are considered foremost in disruption management.
→ **Tree and hedge cutting**	• Bus damage from tree strikes incur significant maintenance requirements and negatively impact operations. This will be further supported by the deployment of protective bars and exploration of technology to mitigate tree strikes on our most affected routes, pinpointing strikes and ensuring these can be swiftly dealt with.

National Bus Strategy Category

→ **Longer term network transformation**

Title of scheme or proposal	Description
→ **Strategic depot**	• The Council is investigating the development of a multi-operator flexible depot space, enabling operators to co-locate with other fleet-operating organisations. Operational and cost efficiencies through shared maintenance, charging facilities, commercialisation will be explored, alongside costings. The BSIP 2021 scheme for shared operator facilities at Longrock is the first of its kind in Cornwall.

National Bus Strategy Category

→ **Bus information and network identity**

Title of scheme or proposal	Description
→ **Targeted marketing activity**	• Marketing & promotional activity and positive communications are integral to influencing public perception, adoption of brands and ultimately, in relation to public transport, encouraging modal switch. Ongoing and targeted marketing activity will continue to encourage sustainable behaviour change within target audiences - this follows the successful engagement of a marketing agency to 2025.
→ **Further development of website and app**	• Customer Information Revolution: Following on from the release of the Transport for Cornwall app/website, the future development of this platform towards a Mobility-as-a-Service (MaaS) platform will be actively explored, enabling wider functionality in terms of multimodal journey planning for public transport, cycle, e-Bike, walking, etc. plus the facility to pay for access to these modes via the app.

National Bus Strategy Category

→ **Bus fleet**

Title of scheme or proposal	Description
→ **Zero emission buses (ZEB)**	• Building on Cornwall's ZEBRA 2 successful bid to electrify the Truro Park & Ride and Falmouth Town Service with 8x ZEBs, and the joint-award with Plymouth City Council for 6x ZEBs in SE Cornwall, Cornwall aims to continue the roll-out of charging infrastructure and ZEBs to facilitate the wider introduction of ZEBs across the network, starting with key depot locations identified in the ULEB Strategy. • The progression of these packages supports Cornwall's bus operators' pledges not to purchase new diesel vehicles after December 2022 and their aim to have a full ZEB fleet by 2035. The ZEBs will make a substantial contribution to kickstarting the decarbonisation of the public service fleet in the County and the delivery of the Council's priority outcomes.

National Bus Strategy Category

→ **Bus passenger experience**

Title of scheme or proposal	Description
→ **Monitoring and evaluation of scheme delivery and impact on bus patronage**	• Cornwall is able to access a growing number of datasets from operators that combines to provide valuable insight on the impact of interventions on the performance of the network and, ultimately, the impact on patronage and satisfaction. Ongoing research will continue to provide such insights in order to shape future direction.
→ **Modernising school transport**	• Programme of moving the issuing and accessing of bus passes for 14,000 scholars to an app-based solution. This will ensure that greater accuracy on usage, demand and capacity required on buses is available. This will provide an improved experience for students.
→ **Evolution of the Bus Passenger Charter**	• Future work with Transport Focus and stakeholders to evolve the existing Bus Passenger Charter to reflect the ongoing commitments of operators and the Council in the Enhanced Partnership Schemes.

National Bus Strategy Category

→ **Other**

Title of scheme or proposal	Description
→ **Capacity building within team (training within team)**	• It is Cornwall's priority to invest in and retain talent in the team, to address recruitment challenges. A programme of professional development opportunities (via formal training or on the job opportunities) will be implemented over 4 years to ensure that staff are skilled and trained to perform the duties and continue to respond to ever changing demands (decarbonisation, electrification) and allow for succession planning.
→ **External support (ongoing support)**	• Ensure specialist technical support is secured to support the delivery of strategic projects.
→ **Promoting sustainable tourism**	• Wider partnership work with local tourism associations will be progressed to encourage sustainable tourism to and within Cornwall and the benefits of using sustainable transport modes to enjoy Cornwall at leisure.





6

These targets have been set to best reflect the aims and objectives of the BSIP. The indicators, baseline data, and targets will be reviewed as part of the ongoing EP reviews.

Performance against targets and annual updates will be published online in accordance with the emerging guidance on the required BSIP Monitoring Reports to be released by DfT later in 2024.



Performance Indicators

Indicator	Specifics	Actual					Target	Target	Measure
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2028/29	
Passenger growth (including Park & Ride passengers)	Overall growth	11.4m	3.8m	7.7m	12m	12.9m ↑	13.1m	13.9m	Operator data by route
Reliability	Overall reliability	86%	88%	73%	67%	71% ↑	80%	95%	Up to 2022/23 - DfT dataset for non-frequent bus services running to time (Bus0902) 2023/24 onwards – Cornwall's Cloud Amber data

Passenger Indicators

Indicator	Specifics	Actual			Target	Target	Measure
		2019	2020-2022 (survey not carried out)	2023	2024/25	2028/29	
Passenger satisfaction	Overall satisfaction	93%	n/a	85% ↓	90%	95%	Transport Focus YBJ satisfaction survey
Passenger satisfaction	Value for money	57%	n/a	75% ↑	77%	79%	Transport Focus YBJ satisfaction survey
Passenger satisfaction	Punctuality	83%	n/a	75% ↓	80%	85%	Transport Focus YBJ satisfaction survey
Passenger satisfaction	Information (on-board)	70%	n/a	66% ↓ (where on-board info was present)	70%	75%	Transport Focus YBJ satisfaction survey
Passenger satisfaction	Information (off-bus)	82%	n/a	72% ↓	80%	85%	Transport Focus YBJ satisfaction survey
Passenger satisfaction	Infrastructure – The bus stop	83%	n/a	76% ↓	80%	84%	Transport Focus YBJ satisfaction survey
Awareness	Awareness of Transport for Cornwall brand	n/a	n/a	57%	68%	75%	Transport Focus YBJ satisfaction survey



Performance Indicators

Indicator: Passenger Growth

Methodology and commentary: Measured by reviewing operator patronage data on a route-by-route basis. It is important that these targets are reviewed and refined periodically and informed by the introduction of interventions and changes likely to impact patronage. Patronage will also be monitored on a granular level – by area; corridor; service; ticket type; demographic - to understand the impact of the different specific BSIP & BFP measures, which will be used to inform the development of the BSIP in future years.

Indicator: Reliability

Methodology and commentary: Until 2022/23 reliability was measured using the DfT Bus Reliability and Punctuality dataset for non-frequent bus services running to time. However, the use of the Council's Cloud Amber data provides data on a more granular basis and so this indicator will now be measured using the same data that is used to inform the regular performance reviews with operators. With the emphasis placed on achieving consistent reliability in this BSIP by operators and the Council, targets have been set to reflect this future focus.

Passenger Indicators

Indicator: Passenger Satisfaction (Various)

Methodology and commentary: Derived from Transport Focus' annual Your Bus Journey surveys, satisfaction scores being monitored in Cornwall's BSIP directly reflect the desire to monitor the impact on passenger satisfaction relating to the area of intervention – Value for Money, Reliability, Infrastructure, etc. as well as Overall Journey Satisfaction. The 2019 Transport Focus survey has been used as the baseline, however the methodology for undertaking this survey changed in 2023 and so scores are now reset. The use of this survey to monitor passenger satisfaction represents the latest independent and representative surveys undertaken – it also allows national benchmarking.

Indicator: Awareness of Transport for Cornwall Brand

Methodology and commentary: Also from the Your Bus Journey survey, the Transport for Cornwall partnership has requested additional questions in its survey to monitor the awareness levels across passengers of the Transport for Cornwall brand. It is important to track the penetration of the brand as awareness of TfC and the benefits it can provide to people's daily lives is vital in changing travel behaviour.

Appendix 1

Bus Passenger Charter

A pledge to provide the best possible bus services in Cornwall

Issued in **August 2022**

This charter sets out what can be expected when using all local bus services that operate across Cornwall. These include the services provided by the following bus operators:

Cornwall by Kernow (First)
Go Cornwall Bus
Hopley's Coaches
OTS
Plymouth Citybus
Roselyn Coaches
Royal Buses
St Ives Bus Company
Stagecoach
Travel Cornwall
Yeo's Contracts

It also covers elements of service provision that are the responsibility of Cornwall Council, which is the local transport authority, including bus stops. Cornwall Council works to co-ordinate and improve public transport and financially supports about half of the bus services operating in the county.

This charter can be made available in other formats, if you would like this information in another format or language please contact: **transport@cornwall.gov.uk**

Transport for Cornwall
Karyans rag Kernow

transportforcornwall.co.uk

Connecting Cornwall's Communities | CORNWALL COUNCIL one and all • onen hag oll

Our pledge to you

What you can expect from bus services in Cornwall:

Services and information

- A network of regular bus services designed to connect people to places according to demand
- A single source of information detailing all you need to know about bus services in Cornwall (including maps, routes, timetables and fares) – please visit **www.transportforcornwall.co.uk**
- A place to wait for the bus that is in a suitable location, with shelter at busier stops. Got an issue with a bus stop or shelter? You can let the council know by contacting **transport@cornwall.gov.uk**
- Up-to-date information at every bus stop equipped with an information display, including details about bus times and fares. If there is no information display, then there will be something to signpost you to this information either via a website link or QR code
- Real Time Information will be displayed at key stops, and is available for all stops on bus operators' travel apps and Traveline

Reliability

- A reliable bus service - that means buses normally running no more than one minute early or five minutes late
- You will be kept informed by the driver and/or via social media if your bus is seriously delayed and why
- Sometimes there are exceptional circumstances that mean buses can't operate as advertised – wherever possible we will keep you informed and let you know about planned changes ahead of time

On the Bus

- A range of value for money tickets that can be used on any bus in Cornwall, with a range of payment methods including cash
- CCTV on most buses for your safety and security
- A space large enough to take one wheelchair or two buggies, on every bus
- A clean bus, both inside and out, at the start of its service (but be patient with us, sometimes it's hard to keep a bus clean – especially when it's raining a lot)
- A smart, friendly and helpful driver
- A pleasant and comfortable journey experience, with a smooth ride

Improving the bus services in Cornwall

- Readily available information about the progress we are making to improve bus services
- You will be able to view information about the performance of bus services against our targets here www.cornwall.gov.uk/transport-parking-and-streets/public-transport/cornwall-s-transport-services/enhanced-partnership-and-bus-service-improvement-plan/. It will be updated every 6 months
- We'll keep you informed of any significant future changes to services and give you an opportunity to comment at **www.cornwall.gov.uk/transport-parking-and-streets/public-transport/cornwall-s-transport-services/buses-in-cornwall**
- You can send us suggestions and comments about bus services and ways that they can be improved by either contacting an operator through the sites listed below, or the council at **transport@cornwall.gov.uk**
- You'll always have any complaint fully investigated and a response provided within 10 working days, with the opportunity to feedback on how well you consider your complaint has been dealt with
- This charter will be updated each year, taking on board your thoughts and comments

The small print

This Charter does not affect your statutory rights. Passengers are carried by each bus operator in accordance with its own conditions of carriage, available from the websites listed below.

Complaints and comments

If your journey has not met your expectations, please let the operator know – they actively welcome comments and suggestions, as well as complaints. Details of how to comment or complain can be found via the operators' websites detailed opposite:

Cornwall by Kernow (First)
www.firstbus.co.uk/cornwall

Go Cornwall Bus
www.gocornwallbus.co.uk

Stagecoach
www.stagecoachbus.com

Hopley's Coaches
www.hopleyscoaches.com

OTS
www.otsfalmouth.co.uk

Travel Cornwall
www.travelcornwall.uk.com

Operators will respond to all complaints within 10 days.

If you are not satisfied with how an operator has dealt with your complaint,please contact Cornwall Council at **transport@cornwall.gov.uk**

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Transport for Cornwall
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transportforcornwall.co.uk

Connecting Cornwall's Communities

CORNWALL COUNCIL
one and all · onen hag oll

Buses in Cornwall will provide an **excellent connection** between **people, communities, businesses** and **services**



Contact us

For advice and guidance please email the Transport Coordination Service:

transport@cornwall.gov.uk

Or call us on:

0300 1234 222

If you would like this information in another format or language please contact:

Cornwall Council, County Hall, Treyew Road, Truro, TR1 3AY

e: equality@cornwall.gov.uk t: 0300 1234 100

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Cornwall Council – one and all • onen hag oll
Go Cornwall bus
Kernow
Stagecoach
Hopley's Coaches
OTS
GWR Great Western Railway
TRAVELCORNWALL
transportfocus
Cornwall Chamber of Commerce

Cornwall recycles
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