Report
February 2024

Canterbury District Bus Strategy - Baseline Report

Canterbury City Council
Our ref: 24510401
Client ref: n/a

steer

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1 Introduction

The Canterbury District Bus Strategy

1.1 The aim of the Canterbury District Bus Strategy is to identify the policy and physical changes and improvements that would be needed in order to adopt a district wide bus-led transport strategy that would significantly reduce car use/dependency. The baseline report is the first phase of work which will inform the development of the Strategy.

This baseline report

1.2 This report will provide information to inform the Canterbury District Bus Strategy including the range of key challenges experienced in the Canterbury district, the baseline level of service frequency, patronage, reliability and accessibility. This information will be used to inform the vision, set objectives which tackle the identified challenges, and set realistic targets for improvement. It will also inform the range of interventions which will help deliver against the objectives and targets.

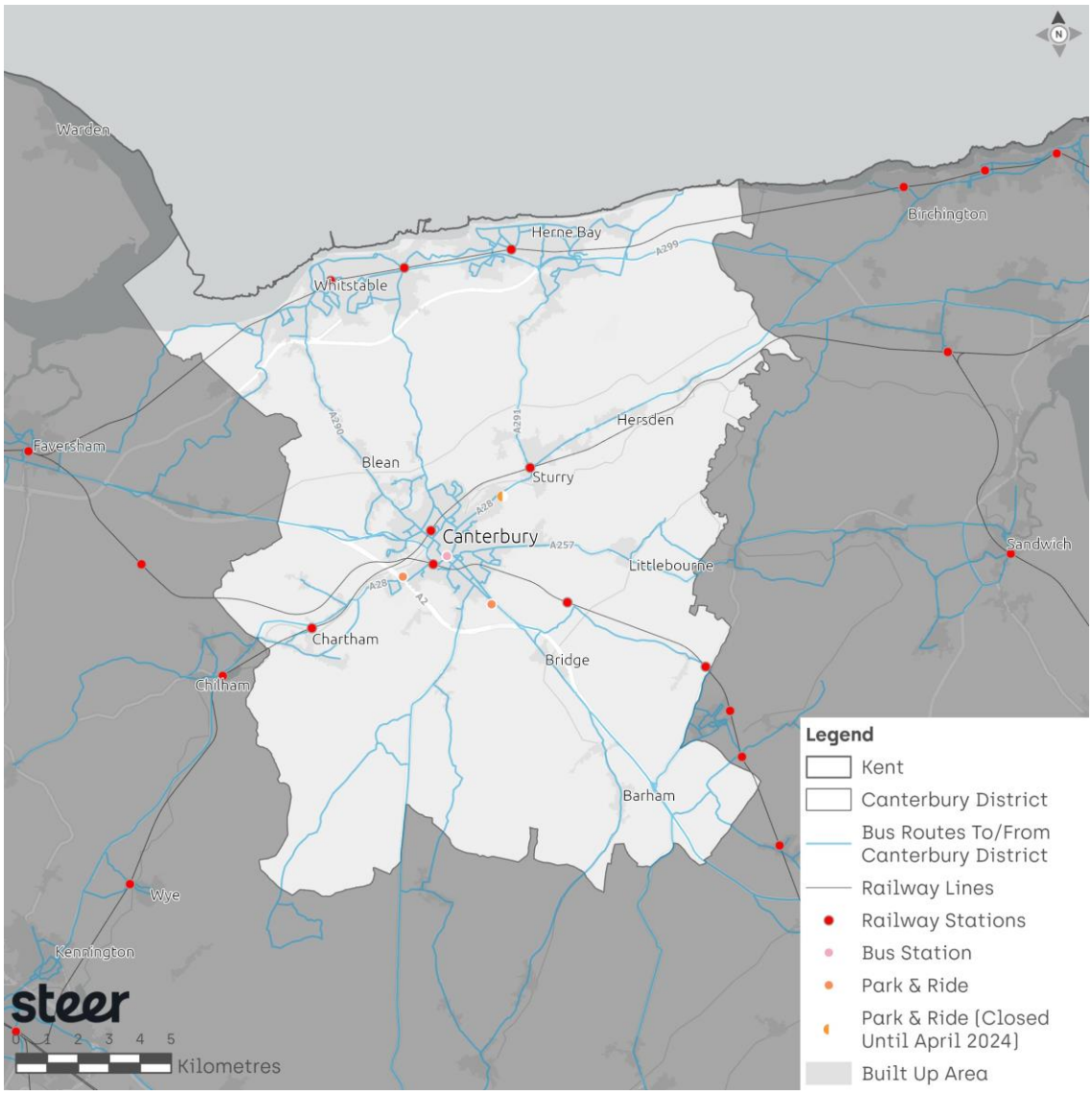
1.3 The baseline report will also be used to inform the emerging Local Plan in terms of patronage and mode share targets and inform the wider multi-modal transport strategy.

Study area

1.4 The study area for the Canterbury District Bus Strategy is defined as the district boundary. This area extends from Canterbury city centre to settlements on radial links including A2 (Bridge and Barham), A28 (Chartham), A290 (Blean), A28 (Sturry and Hersden) and to the towns of Whitstable and Herne Bay on the north Kent coast.

1.5 The district is served by a rail network, which predominantly functions to connect the district and its key settlements with regional destinations in the wider Kent area such as Margate, Ramsgate, Dover, Ashford, Faversham, as well as to London. These connections are predominantly east-west in nature. District public transport connectivity is thus predominantly provided by bus, with direct north-south connections between the main urban areas of Canterbury and Whitstable/Herne Bay provided solely by bus.

Figure 1.1: District Overview



Structure of this report

1.6 This report is structured as follows:

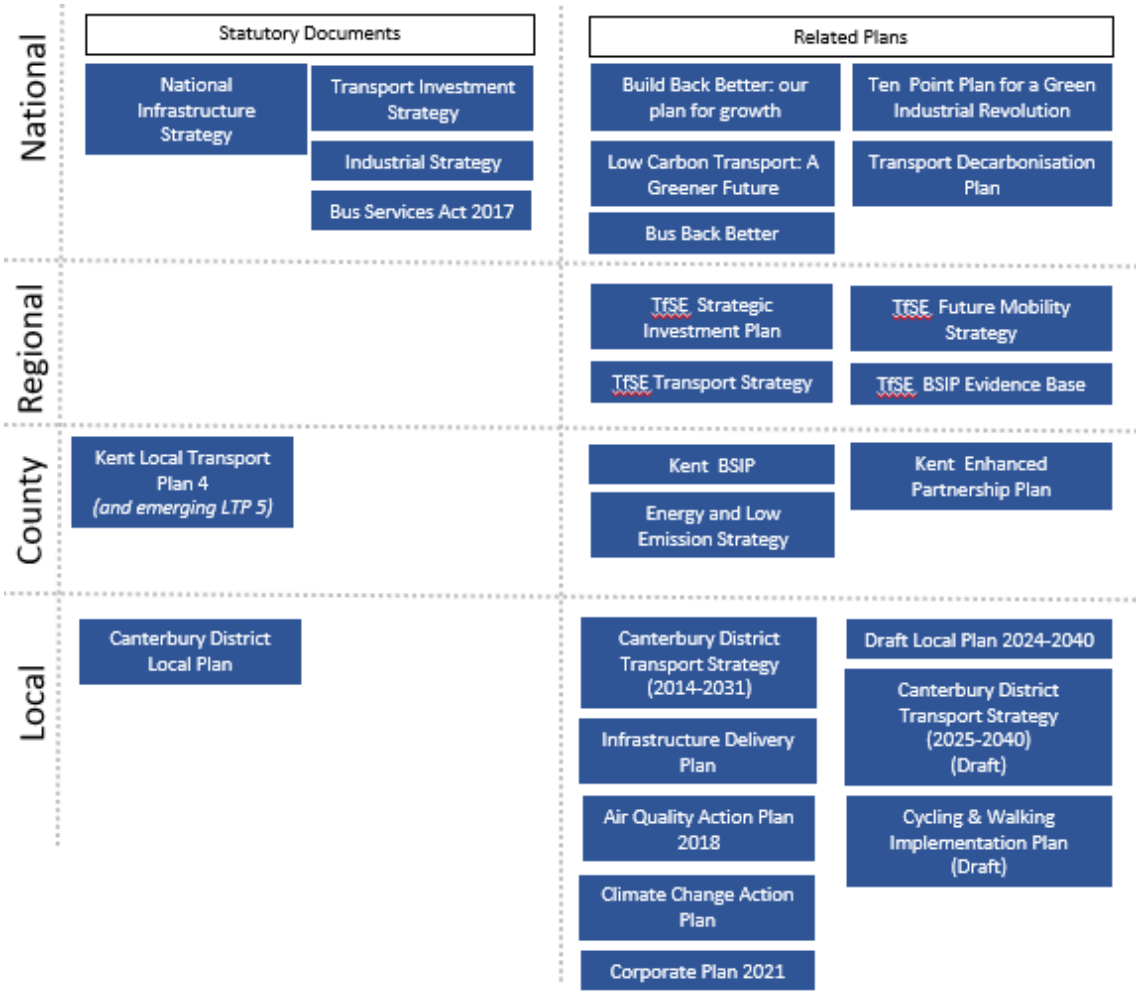
- **Section 2:** Policy and funding context – here the national, regional and local policy, governance and funding context is set out;
- **Section 3:** Understanding the study area – the study area is considered in the context of the existing situation in terms of people, place and connectivity and associated challenges as well as considering the future of the district in terms of proposed local development and the potential impact on transport needs;
- **Section 4:** Stakeholder engagement – here a summary of existing engagement is provided;
- **Section 5:** Need for Intervention – where we set out the strengths, weaknesses, opportunities and threats to bus use in Canterbury, and show how these have supported the development of the bus strategy specific objectives and targets.

2 Policy and funding context

Overview

2.1 The following section summarises key national, regional, county and local policies and plans which the Canterbury City Council Bus Strategy needs to consider in terms of its objectives and desirable outcomes.

Figure 2.1: Policy Overview



National policy

2.2 The **Industrial Strategy (2017)** White Paper aims to boost productivity by backing businesses to create good jobs and increase the earning power of people throughout the UK with investment in skills, industries and infrastructure. Integral to the 'Infrastructure' foundation is transport infrastructure. The White Paper recognises that investment in transport

infrastructure will be needed if the goals of the Industrial Strategy are to be met. The pertinent goals for the bus network related to "Clean growth" and the "Future of mobility".

2.3 The Government's **Transport Investment Strategy (2017)** Command Paper outlines the government's priorities for making transport investment decisions, including a set of priorities and policies to guide those decisions. It is explicitly set in the context of the Industrial Strategy. The strategy includes specific commitments on local and regional transport; it notes that all journeys necessarily make use of local transport at some stage, and that for most journeys, local transport comprises the entirety of the trip. Furthermore, it highlights that urban transport systems are central to making local journeys possible - bus predominantly provides this network in the Canterbury area. Key objectives of the Transport Investment Strategy that are relevant in the context of this study are as follows:

- create a more reliable, less congested, and better-connected transport network that works for the users who rely on it;
- build a stronger, more balanced economy by enhancing productivity and responding to local growth priorities; and
- support the creation of new housing.

2.4 The impact of Covid-19 has resulted in the UK Government developing revised strategic guidance in the form of the **National Infrastructure Strategy (2020).** This strategy sets out plans to transform UK infrastructure in order to level up the country, strengthen the Union and achieve net zero emissions by 2050. Key themes include driving recovery and rebuilding the economy following the Covid-19 pandemic, levelling up and strengthening the Union, decarbonising the economy and adapting to climate change, supporting private investment in infrastructure and accelerating and improving delivery. The strategy includes a commitment to £5 billion of funding for buses (and cycling) and £120 million for electric buses.

2.5 In March 2021, along the Budget the UK Government launched '**Build Back Better: our plan for growth'** which sets out the government's plans to support growth against the context of the Covid-19 pandemic, through significant investment in infrastructure, skills and innovation, and to pursue growth that levels up every part of the UK, enables the transition to net zero, and supports the UK's vision for Global Britain. The document re-emphasises some of the elements of the National Infrastructure Strategy including the £5 billion for buses (and cycling), indicates delivery of the National Bus Strategy in summer 2021 and emphasises the commitment to spending £120 million in 21-22 for over 500 zero-emission buses.

Carbon and emissions

2.6 **Low Carbon Transport: A Greener Future Strategy (July 2009)** intends to enable the UK to meet the requirements of the carbon budgets set under the Climate Change Act 2008. The strategy states its commitment to changing the way long-term transport planning decisions are made including considering CO_2 and other greenhouse gas emissions as one of the five goals that will guide future transport policy-making and infrastructure investment decisions. Government has now set a net zero target and developed a **Transport Decarbonisation Plan** (2021) which sets out how transport will contribute to this cross-sectoral goal. Bus can provide an attractive public transport option and potential for integration with other modes, increasing opportunities for mode shift away from private car and thus further reducing emissions.

2.7 The **Ten Point Plan for a Green Industrial Revolution (2020)** includes as its fifth point a commitment to investment of £120 million next year to begin the introduction of at least

4,000 more British built zero emission buses. There is also commitment to delivery of a £5 billion National Bus Strategy including more frequent and cheaper "superbus" networks and integrated ticketing between operators and modes.

Bus Back Better

2.8 Bus Back Better was launched in March 2021 and sets out the strategy for how the UK government will deliver the £3bn it set aside in February 2020 for a five--year improvement in bus services.

2.9 The strategy seeks to deliver other benefits for passengers which are well suited to delivery via partnership or franchising:

- Key Route and Superbus networks;
- More comprehensive “socially necessary” bus services;
- Lower and simpler fares;
- Multi-operator ticketing at prices close to or at single operator tickets;
- Roll out of contactless payment including multi-operator day and weekly capping;
- More multi-modal integration;
- All bus operators to accept “Jobcentre Plus Travel Discount Card”;
- Services that are simpler and easier to understand;
- More demand responsive services;
- Passengers’ charter.

2.10 Central to the Bus Back Better approach is a presumption that Enhanced Partnerships (EPs) will become the default way of delivering bus services outside London.

2.11 The document also introduced “Bus Service Improvement Plans”, to be produced annually by each Local Transport Authority.

2.12 Bus Back Better includes several other features:

- The Bus Services Operators Grant will be reformed
- A review of whether local authorities are allowed to set up their own operators (currently barred except for those already owned)
- A review of demand responsive services legislation

Regional policy

2.13 Transport for the South East (TfSE) is the sub-national transport body for the Canterbury area, providing strategic direction for transport in Kent and adjacent counties. The **TfSE Transport Strategy (2020)** sets out a vision for a high-quality, reliable, safe and accessible public transport network in the region, with specific strategic priorities around economic, social and environmental goals.

2.14 The document identifies bus challenges around i) services facing competition and congestion from car trips and reduced financial support, ii) pressure of bus services in rural areas. Increased support for inter-urban bus services is proposed in response, along with the need to develop better-integrated transport hubs and reducing public transport fares in real terms. Urban transit schemes are identified as priority interventions in the medium to long term. Specific focus is given to the development of ‘smart’ transport networks, with ambitions to roll out smart ticketing payment across bus services.

2.15 TfSE have developed a **BSIP Evidence Base report (2022)** to support a robust case for greater investment in the bus networks across the region. The report identifies the route between Canterbury and Whitstable/Herne Bay as one of the top ten switchable commute trip flows in the TfSE region, with 4,190 switchable car trips made regularly. Potential inter-urban bus interventions explored in the report include i) higher service frequency along the corridor between Canterbury and Sittingbourne, and ii) bus priority measures between Canterbury and Whitstable/Herne Bay.

2.16 The **TfSE Strategic Investment Plan (2023**) expects to achieve significant improvements in the quality, speed and frequency of bus services in Kent, along with better interchange with rail services. In the long term, bus enhancement are required between Canterbury, Whitstable and Herne Bay to support priorities around economic, social and environmental goals.

2.17 The **TfSE Future Mobility Strategy (2021)** builds on the TfSE Transport Strategy with a long-term 2035 vision for transport in the region. Key ambitions are set around decarbonisation and reducing in car dependency, zero emission mass transit, and an integrated, connected, resilient mobility ecosystem.

County policy

2.18 The existing **Local Transport Plan 4 (LTP4) (2016-2031)** for Kent identifies short and long-term transport priorities for the county across all modes, and sets policies to deliver strategic outcomes. The overarching vision for transport in Kent looks to "deliver safe and effective transport, ensuring that all Kent's communities and businesses benefit, the environment is enhanced and economic growth is supported".

2.19 Five key outcomes underpin the policy priorities for the Kent LTP4.

- Economic growth and minimised congestion: deliver resilient transport infrastructure and schemes that reduce congestion and improve journey time reliability to enable economic growth and appropriate development, meeting demand from a growing population.
- Affordable and accessible door-to-door journeys: promote affordable, accessible and connected transport to enable access for all to jobs, education, health and other services.
- Safer travel: provide a safer road, footway and cycleway network to reduce the likelihood of casualties and encourage other transport providers to improve safety on their networks.
- Enhanced environment: deliver schemes to reduce the environmental footprint of transport, and enhance the historic and natural environment.
- Better health and wellbeing: provide and promote active travel choices for all members of the community to encourage good health and wellbeing, and implement measures to improve local air quality.

2.20 Additionally, the LTP4 sets a specific action around working closely with bus operators and other partners to ensure a high level of bus mode share. Location-based transport priorities were also identified for all urban centres, including Canterbury. These included the completion of the A28 Sturry Road bus link, and development of a south Canterbury 'fast bus link'.

2.21 The implementation plan for the **Kent and Medway Energy and Low Emission Strategy (2020-2023)** sets out specific actions of decarbonising bus fleets. These include:

- Trialling new transport projects that drive the transition of Ultra Low Emission Vehicle public transport. Including:
  - fully electric bus routes in Dartford, Dover and Canterbury,

  - electric minibus trial in partnership with Compaid[1],
  - hydrogen fuelled bus trials linked to green hydrogen facilitate in Canterbury District
- Work with public transport providers to achieve EURO VI emissions standards or better.

Local policy

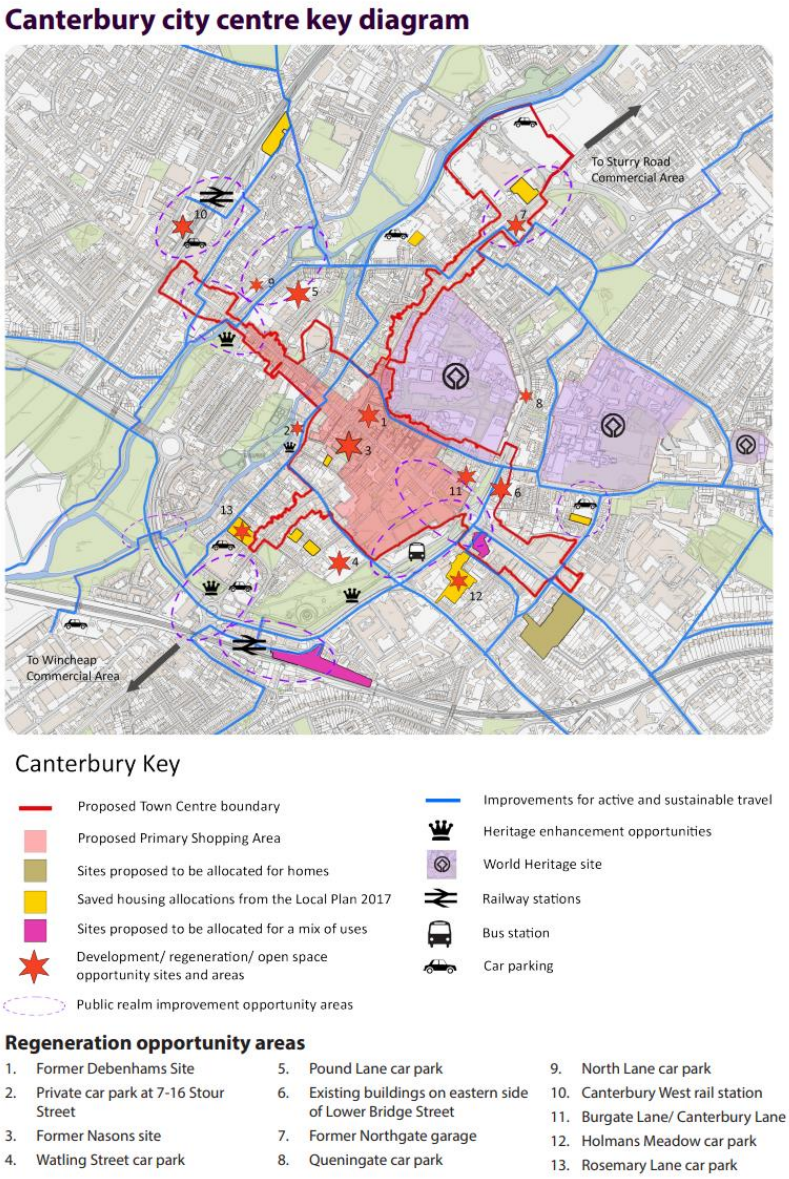
2.22 The emerging **Canterbury District Local Plan** to 2040 sets out how the area is expected to grow and develop in the long-term. Its vision for 2040 revolves around developing a strong and resilient economy, improving connectivity, fostering healthy communities and create a thriving environment. Specific strategic objectives relevant to the bus strategy include:

- Create a transport network with a focus on low-carbon travel to improve air quality and people's health while ensuring excellent access to city and town centres on foot, cycle and by public transport including through intelligent transport systems.
- Take advantage of and improve links to/from London and the Continent, while creating a local transport network which enables most residents, particularly those in urban areas, to access their day to day needs within 15 minutes through healthy, environmentally friendly journeys.
- Support the sustainable growth of our rural communities through the provision of affordable housing, community facilities and transport infrastructure while taking advantage of opportunities to grow the rural economy.

2.23 The Local Plan sets out key development and regeneration opportunity areas within Canterbury city centre; this presented in Figure 1. Significant changes to land use, density and population demographics in the city centre may have notable changes on the demand for bus travel.

[1] Compaid delivers Kent County Council's Kent Karrier accessible dial a ride service currently serving Swale, Ashford, North West Kent, Sevenoaks, Tunbridge Wells, Tonbridge and Malling and Maidstone.

Figure 2.2: Proposed new developments and regeneration opportunity areas in Canterbury city centre



Source: Draft Canterbury Local Plan

2.24 The accompanying **Infrastructure Delivery Plan** outlines key priorities and issues for bus improvements in the district and identifies specific interventions.

- Package of bus infrastructure improvements in villages to encourage public transport
- Bus lane interventions at Sturry Road and from Rheims Way London Road to St Peter's roundabout.
- Canterbury bus station is identified as currently suffering from overcrowding at peak times. The Council has identified this area as an opportunity for improvement to create a more pedestrian friendly environment and increase passenger capacity, facilitate higher bus patronage.

2.25 At the local level, the **Canterbury District Transport Strategy (2014-31)**, adopted in 2017, provides a long-term transport policy framework for the city. Its overarching aim is to "improve access to services, goods and opportunities and tackle the negative impacts of traffic by promoting sustainable modes of transport, achieving reliable vehicle journey times and supporting sustainable development".

2.26 'Encouraging sustainable travel' forms one of four key strands of the strategy. While its overall aim is to encourage the use of alternative modes of transport as an alternative to the private car, to provide a number of bus-specific action areas. These include:

- Extending bus services and increasing frequencies
- Reducing the relative cost of bus travel compared to driving
- Establishing a fast bus route from south Canterbury
- Completing the Sturry Road bus lane
- Implementing bus priority measures on Old Dover Road, New Dover Road, Wincheap and Borstal Hill.

2.27 Moreover, the Strategy action plan sets out further specific measures that KCC and CCC are aiming to implement in the timeframe covered by this document. These include:

- All new developments to have high quality bus provision, with stops located within 400 metres of all premises.
- Provide at least five new or upgraded bus shelters per annum
- Continue rolling out accessible bus boarders at every bus stop
- Continue providing bus stop clearways at every bus stop
- Develop and promote a mobile phone 'bus app' for real-time information of departures and arrivals.
- Improve passenger payment methods by utilising technological innovation, including prepaid smartcards and contactless bank payments.
- Consider creating integrated transport hubs at railway stations, including integrated bus services, inter-urban coach services and park and ride services.
- Work closely with bus operators to continue to increase the proportion of the fleet that meets the highest emission standards
- Establish a bus user group to ensure the needs of bus passengers are given sufficient consideration in transport decisions
- Consider aligning costs of bus travel to cost of driving for key routes into Canterbury, particularly group fares.

Climate change and carbon reduction

2.28 Canterbury City Council has declared a climate emergency in 2019 and has adopted the Climate Change Action Plan in 2021. It sets the target for all activities related to Council work, services and buildings to be carbon net zero by 2050.

2.29 The Action Plan sets out key measures for reducing carbon emissions, including a measure on heavy fleet decarbonisation, which entails the development of options appraisal to inform and plan for phased changes to decarbonise bus fleets, refuse collection and street cleaning.

Cycling & Walking Implementation Plan

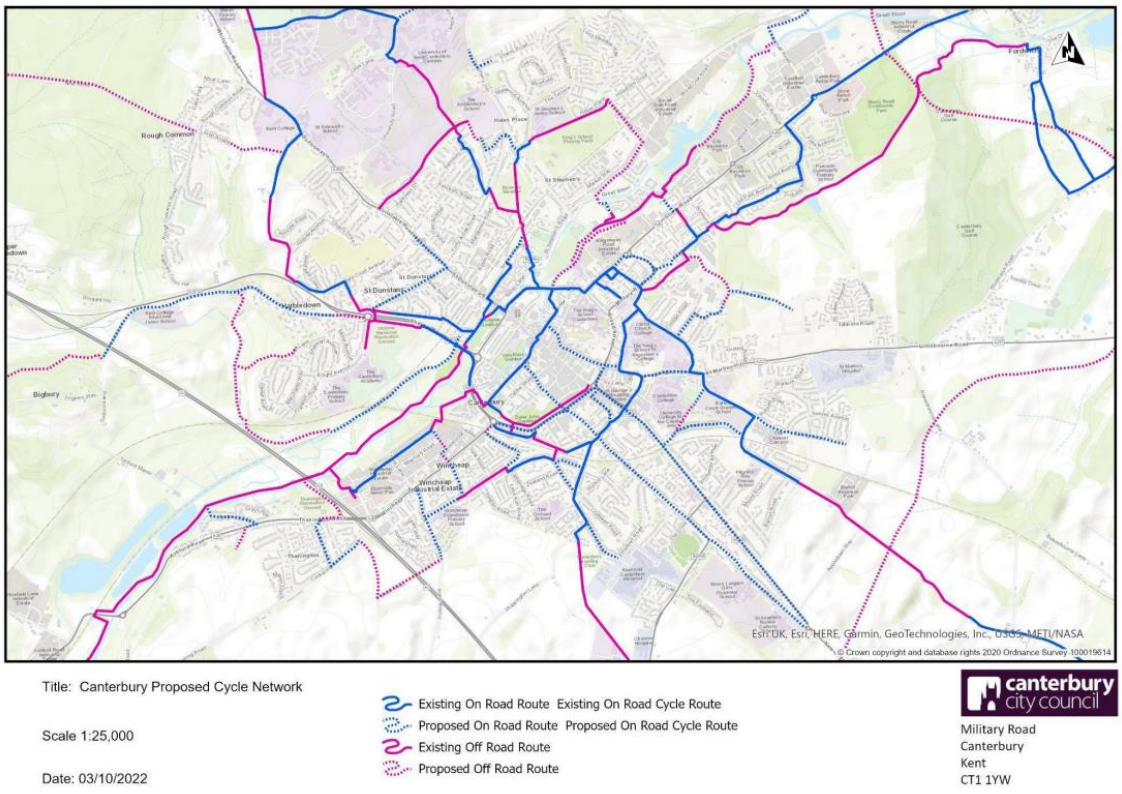
2.30 The Local Cycling and Walking Implementation Plan (LCWIP) for the Canterbury district includes a range of proposals to develop the on and off-road cycling network. In order to ensure that on-road bus infrastructure proposals and cycling infrastructure proposals do not

conflict with one another, particularly in areas where road space may be limited, it will be required to consider how bus and cycle proposals will interact and where potential conflicts arise, how best to use available roadspace.

2.31 Particular areas where these conflicts may arise are those where proposed cycle infrastructure improvements are suggested on existing key bus corridors and where general traffic volumes are also present. These includes:

- Rhodaus Town;
- Upper Bridge Street;
- Lower Bridge Street;
- Pin Hill;
- London Road;
- Whitstable Road;
- Old Dover Road;
- New Dover Road; and
- Sturry Road.

Figure 2.3: LCWIP proposals – Canterbury City



Parking policy

2.32 A previous parking assessment conducted by Steer as part of the Canterbury Parking Strategy review identified low occupancy at Park and Ride sites (57% at midday) compared to high occupancy at city centre car parks (89%). This suggested that, at the time, park and ride services were not the preferred method of travel into the city for most people. Actions to improve Park and Ride bus services could act to decongest central car parks and incentivise greater usage of existing Park and Ride facilities. The review identified actions to:

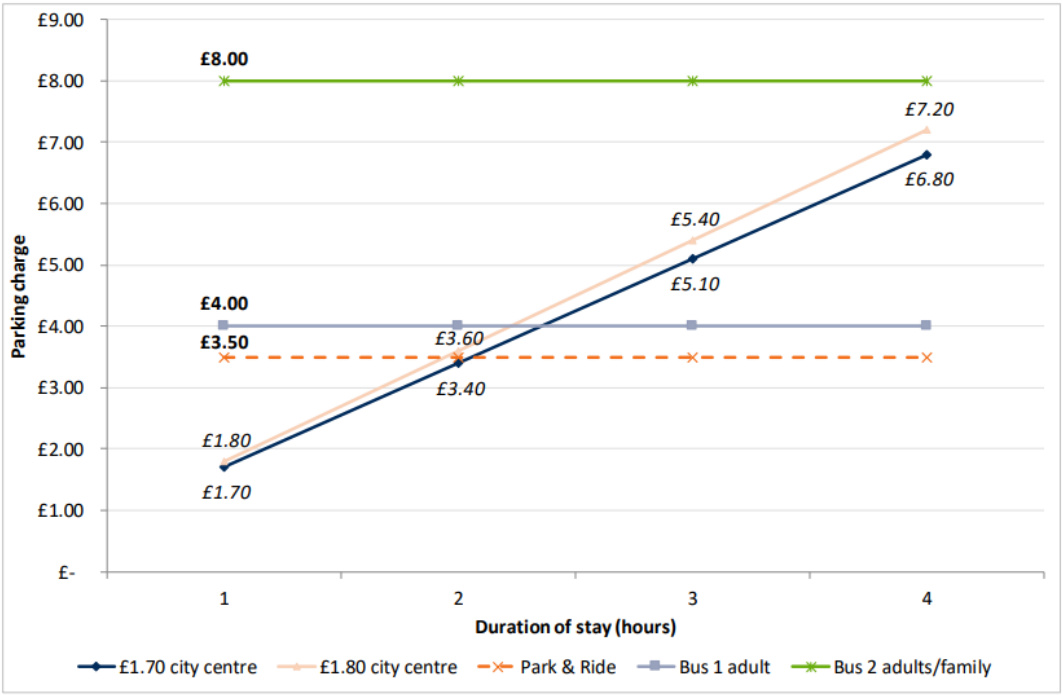
- **Re-balance the parking supply in favour of Park and Ride.** This could be achieved through closure of car parks identified as potential development sites in the 2006 Local Plan (and carried over to recent iterations).
- **Improve Park and Ride marketing.** This could be done through better information provision on the Council website, signage and other information sources for city centre visitors.

2.33 At the time of writing in 2019, the report noted that there was no viable business case for upgrading to electric buses, compared to using Euro IV diesel buses, due to existing limitations in technology, the need for 'boost charging' during the day and high prices associated with battery technology. The report recommended that:

- **Canterbury CC monitors developments in battery electric bus technology** and waits until batteries offer sufficient capacity to operate a full day service, including any extensions in the times of Park and Ride provision. At that point, Park and Ride service may be operated by electric buses.

2.34 An analysis of parking fares and bus journey fares at the time, showed that bus fares and Park and Ride fares were overall less favourable than short-term car parking fares in the city centre.

Figure 2.4: Parking charge vs duration of stay



Source: Canterbury District Parking Strategy Review

Kent Bus Service Improvement Plan and Enhanced Partnership

2.35 In response to the National Bus Strategy, Kent County Council (KCC) and local bus operators have developed the **Kent Bus Service Improvement Plan (BSIP) (2021)**. The document sets out 11 key principles for delivering bus improvements in the County. These include:

- Form Enhanced Partnerships covering all public buses in Kent.
- Put the customer at the heart of the bus improvement programme.
- Seek to secure all available funding for network developments.
- Continue to support the development of the community transport sector in Kent to supplement the core bus network.
- Consider and embrace innovative transport solutions such as DRT and MaaS and make use of BRT where appropriate.
- Provide flexible and better value ticketing options.
- Improve quality and accessibility of public transport information.
- Strive to improve levels of physical and digital accessibility.
- Promote the role of buses in solving air quality issues.
- Put buses at the centre of decision-making in respect to new road schemes, planning and developments.
- Continue to promote the bus as a convenient, cost-effective and sustainable means for travel to school and college.

2.36 Targets are set for 2024/25 around improving journey times, bus reliability, increasing passenger numbers and passenger satisfaction, as well as reducing vehicle emissions. These are tied to specific initiatives and include:

- Journey time – average bus speeds of 24.7 kmph
- Reliability of service timekeeping at 95%
- Reliability of service operating at 99.5%
- Passenger numbers up to 58.2 million (+5% on 2018/19 levels)
- Passenger satisfaction of 95%
- Percentage of bus fleet using low or zero emission vehicles at 40%

2.37 DfT has provided £35m in funding for the BSIP with £19m invested in 2022 and £16m in 2023.

2.38 KCC have made the decision to form Enhanced Partnerships with bus operators to cover the whole of Kent from March 2022, as key tool for delivering the Kent BSIP. The **Kent Enhanced Partnership Plan (2023)** covers the period from 2022 to 2027 and sticks closely in its policy direction to the 11 key principles outlined in the BSIP. A range of specific initiatives are set out which are aimed at helping to deliver these key principles. These include a mix of measures that do and do not require funding associated with the National Bus Strategy. Canterbury-specific initiatives include:

- Bus priority improvements along the Canterbury City Centre to Sturry corridor.
- Revisions to service 8/8A to reinstate the Canterbury to Broadstairs link.

Further measures apply to Canterbury City Council (CCC) among other local councils in Kent, including:

- Ensuring that appropriate bus service provision is actively considered as part of new planning applications, including housing schemes.
- KCC will offer annual Rural Shelter Grant to support delivery of improved shelters in more rural areas as funding permits.

- KCC will work to identify and deliver bus standing and driver facilities to support network growth and service reliability.
- KCC will press for inclusion of bus priority measures as part of new developments.
- For any new / upgraded highway schemes under KCC's control, they will explore the potential of bus service improvements which would enhance reliability, service levels and accessibility and incorporate as funding permits.
- KCC will ensure that park & ride, coach services, community transport services and DRT schemes are integrated with the conventional bus network, including in marketing and ticketing schemes.
- Where funding permits, KCC will deliver publicity campaigns to promote the role of the bus in meeting environmental challenges.

Role of Enhanced Partnership

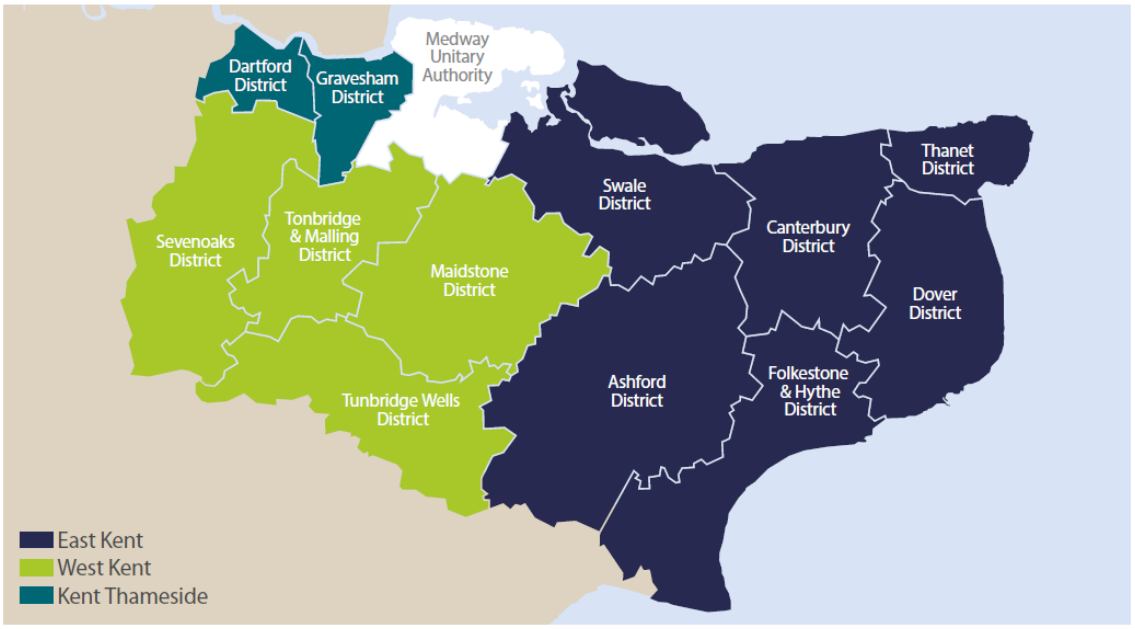
2.39 In June 2021, following a statutory decision by the Cabinet Member for Highways and Transport, KCC identified that in line with Government guidance it would be forming an Enhanced Partnership (EP) for Kent from March 2022. The EP model allows KCC to build on the positive relationships it already has with the county's bus operators, in order to seek to deliver the aspirations of the NBS and the BSIP.

2.40 The use of franchising was given due consideration but was not deemed appropriate at this time. Franchising is not automatically available to non-mayoral authorities and there are considerable questions over the implications on resourcing and subsequent service levels which could be delivered in the county. KCC also already has strong relationships with its operators which can be the basis for more formal statutory EP Schemes in the future.

2.41 Close ties already exist between operators and KCC through such initiatives as the Kent Travel Saver, Kent's eight Quality Bus Partnerships (QBPs) and through management of contracted local bus services. It is felt that these existing relationships will form a strong base for establishing an EP model.

2.42 The formation of three Enhanced Partnership Schemes (as shown in Figure 2.5) were therefore identified as the appropriate mechanism for KCC and its bus operators to meet the requirement of the NBS in introducing 'a new statutory path for the regulatory set up of bus services in the county by March 2022'.

Figure 2.5: Kent Enhanced Partnership Scheme Areas



Source: Kent Bus Service Improvement Plan 2021

2.43 A set of Key Principles informed the priorities in the BSIP. These principles are set out below.

Table 2.1: Key principles of the Kent BSIP

Principle	Description
Regulation	Form Enhanced Partnership Agreements covering all public buses in Kent, setting ambitious targets with respect to punctuality, journey times, vehicle quality and accessibility.
Customer	Put the customer at the heart of everything we do through developing a passenger charter agreed through EPs and by developing the Bus Services Feedback portal.
Network developments:	Seek to secure all available funding and prioritise its use to 1) recover from the pandemic and stabilise the current network, and 2) further develop and enhance Kent's public transport through a range of initiatives Undertake a countywide and then localised network analysis to help inform the use of existing and new funding, with a view to providing service enhancements for rural communities where levels are currently lacking. Continue to support the development of the community transport sector in Kent to supplement the core bus network.
Innovation and digital accessibility	Consider and embrace innovative transport solutions such as DRT and MaaS models as possible alternatives to the private car and make use of BRT where appropriate.
Fares and ticketing	Provide flexible and better value ticketing options and use technology to provide cashless and ticketless solutions on all operators' services.
Public transport information	Improve the quality and accessibility of public transport information, including the provision of a one-stop-shop for live bus times and fares

	information and making greater use of technology e.g. for voice announcements.
Accessibility	Strive to improve the levels of physical and digital accessibility both on buses and through infrastructure to ensure a fully accessible network for disabled passengers.
Environment and air quality	Promote the role of buses in solving air quality issues and work with operators and other stakeholders to improve emissions standards. This would include using funding to support the move from diesel to emission-free vehicles.
Infrastructure, network management and new developments	Put buses at the centre of decision making in respect of new road schemes, planning and developments, and support bus operators and services in KCC's role as the highway authority.

2.44 A range of initiatives are included in the East Kent Enhanced Partnership as follows. Ensuring the Canterbury bus strategy is complementary to these initiatives will be important to ensure most efficient use of resources.

Figure 2.6: East Kent Enhanced Partnership interventions

Reference	Network Development	Requires NBS Funding?
NDI 1	KCC will secure all available funding and prioritise its use to support services, alongside BSOG, that have become unsustainable at reduced passenger levels until such time as other NBS initiatives drive growth.	YES
NDI 2	KCC and Kent's bus operators will deliver a range of Year 1 service initiatives based on feedback gathered through engagement activity with operators, stakeholders and the general public. Initiatives will be prioritised based on evaluation criteria which takes into account factors such as network gap analysis (e.g. accessibility to town centres), sustainability, value for money and deliverability.	YES
NDI 3	KCC and Kent's bus operators will deliver a range of Year 2 and 3 service initiatives which address areas with poorer accessibility levels identified through our Network Gap Analysis. In these areas more detailed analysis will be undertaken which will consider changes to the commercial and subsidised bus network, taking account of over and underserved corridors, the use of DRT and other alternative solutions and the Total Transport Concept, including the relationship with other layers of transport provision such as home to school and patient transport services.	YES
NDI 4	KCC and Kent's bus operators will seek to increase the proportion of the population within the 15, 30 and 45-minute catchment of the closest defined town centre for their district by improving corridor performance, service levels, speed and integration, including during off-peak hours.	
NDI 5	KCC will review its criteria for the support of council-funded socially necessary bus services to ensure it continues to reflect the travel needs of the community and is in line with the changing requirements of the NBS.	
NDI 6	KCC and Kent's district councils will produce a Memorandum of Understanding (MOU), to ensure that improvements to bus services are fully considered and delivered with consideration of new planning developments.	

Reference	Alternative Delivery Models	Requires NBS Funding?
ADMI 1	KCC will continue to develop Fastrack Kent Thameside to delivery of full network, roll out the service to Dover and give consideration to the future relationship between Fastrack Kent Thameside and Crossrail.	
ADMI 2	KCC will establish a policy to ensure opportunities for BRT are explored, including the creation of a housing development triggerpoint for larger scale developments.	
ADMI 3	KCC will continue to support the community transport sector. We will continue to refine our toolkit to support the sector's growth, and continue to run grant schemes that fund the delivery of new community transport services.	YES
ADMI 4	KCC and Kent's bus operators will consider areas where a Superbus approach to network development could be implemented to deliver improvements in infrastructure, fares, reliability and journey times and achieve a 'premium' service standard.	YES
ADMI 5	KCC and Kent's bus operators will consider the role that DRT, feeder services and other alternative modes can play in solving rural connectivity issues.	YES

Reference	Fares and Ticketing	Requires NBS Funding?
FTI 1	KCC and Kent's bus operators will introduce a multi-operator ticket covering the Kent network and through this will seek to introduce a simpler, more attractive and flexible ticketing offer.	YES
FTI 2	KCC and Kent's bus operators will look to identify and deliver specific fares and ticketing schemes, with a particular focus on initiatives which support recovery from the pandemic and access to tourism, employment opportunities and the support of Kent businesses.	YES
FTI 3	KCC will support Kent's bus operators to develop their ETM and related back-office capabilities to enable the introduction of innovative and user-friendly ticketing offers including full network acceptance of contactless payments and fare capping.	YES
FTI 4	KCC will consider the fares, ticketing and backoffice requirements required to enable the introduction of ticketing solutions covering bus, rail and other modes to support the MaaS concept of service delivery.	
FTI 5	Through our EP Schemes, KCC and Kent's bus operators will seek to support the acceptance of multi-operator tickets on common sections of route.	
FTI 6	KCC will seek to continue to support home to school travel through initiatives such as the Kent Travel Saver, which make journeys more attractive and cost effective for the user.	YES

Reference	Infrastructure and Priority	Requires NBS Funding?
IPI 1	KCC will ensure that there is continuous focus on the quality of marked bus stops across Kent. KCC will look to provide high quality boarding and alighting points for passengers as far as possible and continue to drive forward improvements in accessibility and appearance across Kent's bus stop assets.	YES
IPI 2	Working with borough, district and parish councils, KCC will seek to deliver improvements in the provision and maintenance of bus shelters across the county, placing particular emphasis on using advances in technology to incorporate environmental benefits.	YES
IPI 3	Through working with borough and district councils, KCC will seek to ensure that as Kent's bus network develops it provides appropriate operator facilities such as bus stands and driver amenities.	YES
IPI 4	With a focus on integration, KCC will create a hierarchy for bus stops in Kent to identify key locations that have high levels of connectivity, either with other bus services or other transport modes. We will seek to deliver improvements beyond the 'standard' offer at these locations, with bike parking facilities, higher levels of passenger information, etc.	YES
IPI 5	KCC will use advances in technology to ensure Kent's bus stops are modern, safe and of a high standard of appearance, to enhance the user experience.	YES
IPI 6	KCC will look to evaluate the merits and feasibility of two bus priority schemes per year in each EP Scheme. These will take account of bus congestion modelling identifying pinch points that affect bus journey times, and consider local context and sensitivity, as well as potential network and passenger gain.	YES
IPI 7	KCC will support infrastructure and highway schemes to support the development of Bus Rapid Transit (BRT) projects in Kent.	YES

Reference	Environment and Air Quality	Requires NBS Funding?
EAQI 1	KCC and Kent's bus operators will explore all opportunities to secure funding to improve emission standards on buses operating across Kent, with a particular focus on moving parts of the network towards zero emissions.	YES
EAQI 2	KCC will form an air quality corridor hierarchy taking account of Kent Air Quality Management Areas, and use this as the basis on which to prioritise future funding for zero emission corridors.	YES
EAQI 3	KCC will use the EP process to establish minimum standards for emissions on buses operating in Kent, seeking to introduce a targeted approach to improve standards over the term of the EP Schemes.	
EAQI 4	KCC and Kent's bus operators will actively promote the environmental benefits of the bus through better promotion of the network and the comparable impact of bus use against other modes of transport.	

Reference	Innovation and Digital Accessibility	Requires NBS Funding?
IDA 1	KCC will support operators financially to help them secure enhanced ETMs, associated backoffice function and TransXChange and Real Time Information capability. This will support a range of initiatives in respect of Real Time Information, ticketing and reliability.	
IDA1 2	KCC will embrace the use of modern technologies and software to support a dataled approach to network planning.	YES
IDA1 3	KCC will deliver a MaaS pilot scheme in the North West Kent EP Scheme areas. We will look to expand the use of this platform to other parts of the county subject to the pilot providing a multi modal approach to service delivery.	YES
IDA1 4	KCC will seek to embed the use of new innovation and technology to improve bus passenger experience, e.g. next stop announcement technology, the development of a passenger occupancy tool, audio announcements at bus stops and capital grants for supporting the introduction of RTI displays at strategic bus stop locations.	YES

Reference	Public Transport Information	Requires NBS Funding?
PTII 1	KCC will develop the Kent Connected journey planner in order to provide enhanced journey and route planning functionality.	
PTII 2	KCC will provide a one-stop-shop for Kent public transport information including an interactive bus map with pop up timetables, access to e-ticketing, links to bus operator websites, pop up timetables, ticketing and fares information available via web and app platforms.	YES
PTII 3	KCC will develop the use of bus stop QR codes to provide instant access to operators' websites, fares, timetables, RTI, journey planner and other facilities such as links to other websites, tickets and events.	YES
PTII 4	KCC and Kent's bus operators will establish an agreed minimum standard of information to be displayed at all marked bus stops.	YES
PTII 5	KCC and Kent's bus operators will proactively promote the bus network and the role of buses in supporting strategic priorities and other activity such as tourism, environmental benefits, road safety etc. We will work with key partners to ensure public transport is publicised with events.	YES
PTII 6	KCC and Kent's bus operators will look to agree a common identity and approach to the design of publicity relating to all bus services around the county.	YES

Reference	Highways & Network Management	Requires NBS Funding?
HNMI 1	KCC will ensure that new/upgraded road schemes delivered by the authority fully consider the requirements of buses with respect to access and design. In line with the NBS, KCC will also ensure that new/upgraded road schemes fully consider bus improvements or bus priority. If this is not possible, schemes will clearly detail why this is the case. KCC will strongly encourage its partners to follow similar principles for schemes not delivered by the LTA.	
HNMI 2	As part of its network management duty, KCC will actively consider how the punctuality and reliability of buses can be improved through the management of the network in terms of traffic signalling, junction changes, traffic flow control etc. The Kent County model will be used to identify congestion hotspots as part of this process to target where change is required.	YES
HNMI 3	KCC will re-purpose and re-launch its Punctuality Improvement Partnerships (PIPS) to ensure that they have the biggest impact on reliability/punctuality on the ground. KCC will work with bus operators to agree an appropriate format for the groups and closely link outputs to Enhanced Partnership targets.	
HNMI 4	Working with district partners KCC will actively consider the management of parking issues which cause bus routes to be blocked including a) illegitimate parking on existing restrictions and b) potential new restrictions to ease service flow.	
HNMI 5	KCC will establish a roadworks review taskforce (held quarterly), including representatives from KCC Highways, bus operators, utility companies, Highways England and any other key stakeholders. The meetings will focus on the link between works on the highway and bus service operation and will enable discussion at a strategic level, with key outputs subsequently picked up by PIPs for delivery.	
HNMI 6	KCC will continue to support the position of a Soft Landscapes Technical Support Officer for bus routes, to ensure that vegetation issues effecting bus passage are expedited as far as possible. A review will be undertaken on how emergency requests are dealt with.	
HNMI 7	KCC will continue to consider the most appropriate means of enforcing bus gates and bus lanes through liaison with district councils. The potential for KCC to manage a central common back office will be explored as part of this process.	YES
HNMI 8	To support the initiatives in this section, KCC is seeking to use NBS funding to secure dedicated staff resource and software to support highways issues. Posts are likely to include a Major Projects Highway Engineer focused on bus priority schemes and other more major bus projects, a Highway Engineer focused on smaller, more localised interventions to support bus reliability and access, and a Parking/ Roadworks Co-ordination Officer picking up enforcement issues through liaison with district councils and roadworks issues emerging from roadworks review meetings (see HNMI5).	YES
HNMI 9	KCC will work with district councils to undertake a countywide review of parking policy and its relationship with bus usage.	YES

Source: EP Plan and Scheme with one off DfT funding, East Kent Enhanced Partnership, 2023

Funding

2.45 A range of funding opportunities currently exist to support existing and new bus services. These are summarised in Table 2.2 and include existing and potential funding options as follows:

- Bus Services Operators Grant (BSOG);
- Planning Obligations & Developer Contributions (Section 106);
- Community Infrastructure Levy;
- Contribution from stakeholders;
- Levelling up fund;
- Business Rates Supplement;
- Business Rates Uplift;
- Business rates retention; and
- National Bus Strategy.

Table 2.2: Funding Opportunities

Funding opportunities	Description
Bus Services Operators Grant (BSOG)	BSOG is a grant paid to operators of eligible bus services and community transport organisations to help them recover some of their fuel costs. BSOG also aims to benefit passengers by helping operators keep fares down and enabling operators to run services that might otherwise be unprofitable and could lead to cancellation.
Planning Obligations & Developer Contributions (Section 106)	This involves legally binding commitments made by landowner whilst seeking planning permission to develop their land. They require the landowners to ensure that transport provision is adequate for the needs of the new development. S106 obligations will remain despite the introduction of Community Infrastructure Levy (CIL) where S106 is restricted to the infrastructure required to directly mitigate the impact of the development while CIL can be used for off-site developments.
Community Infrastructure Levy	CIL is a levy charged to developers to finance sustainable transport options. CIL payments contribute to the additional burden new developments make on infrastructure both at a local and strategic level and enables local authorities to capture a share of the land value gain accruing to development companies. CIL is applied on a zonal basis, with different rates charged between and within Local Authority jurisdictions. The finance generated can be targeted towards a broader, area-related series of transport improvements rather than a specific set of improvements associated with one particular development
Contribution from stakeholders	Direct contributions from stakeholders that will benefit directly from the scheme, this may include other transport companies whose operations are made more efficient or businesses and academic institutions that will benefit from new or improved infrastructure provision.
Levelling up fund.	The £4.8 billion fund supports town centre and high street regeneration, local transport projects, and cultural and heritage assets. Canterbury received £22m in funding with schemes funded including improvements to Canterbury Bus Station.
Business Rates Supplement	The Business Rate Supplements Act makes provision for councils to levy a supplement on the national non-domestic rate (or business rate).
Business Rates Uplift	A call for the business rate uplift generated to be managed by the SE LEP with flexibility to allow the LEP and partners to re-invest against agreed priorities
Business rates retention	It will provide a direct link between business rates growth and the amount of money councils have to spend on local people and local services. Councils will be able to keep a proportion of the business rates revenue as well as growth on the revenue that is generated in their area. Currently 50% of business rates are retained by local authorities and the intention of central government is to allow councils retain 100% of business rates by 2020. Furthermore, local authorities will be able to change business rates.
National Bus Strategy	Support in delivering up to 4,000 zero emission buses, bus priority measures and BRT schemes.

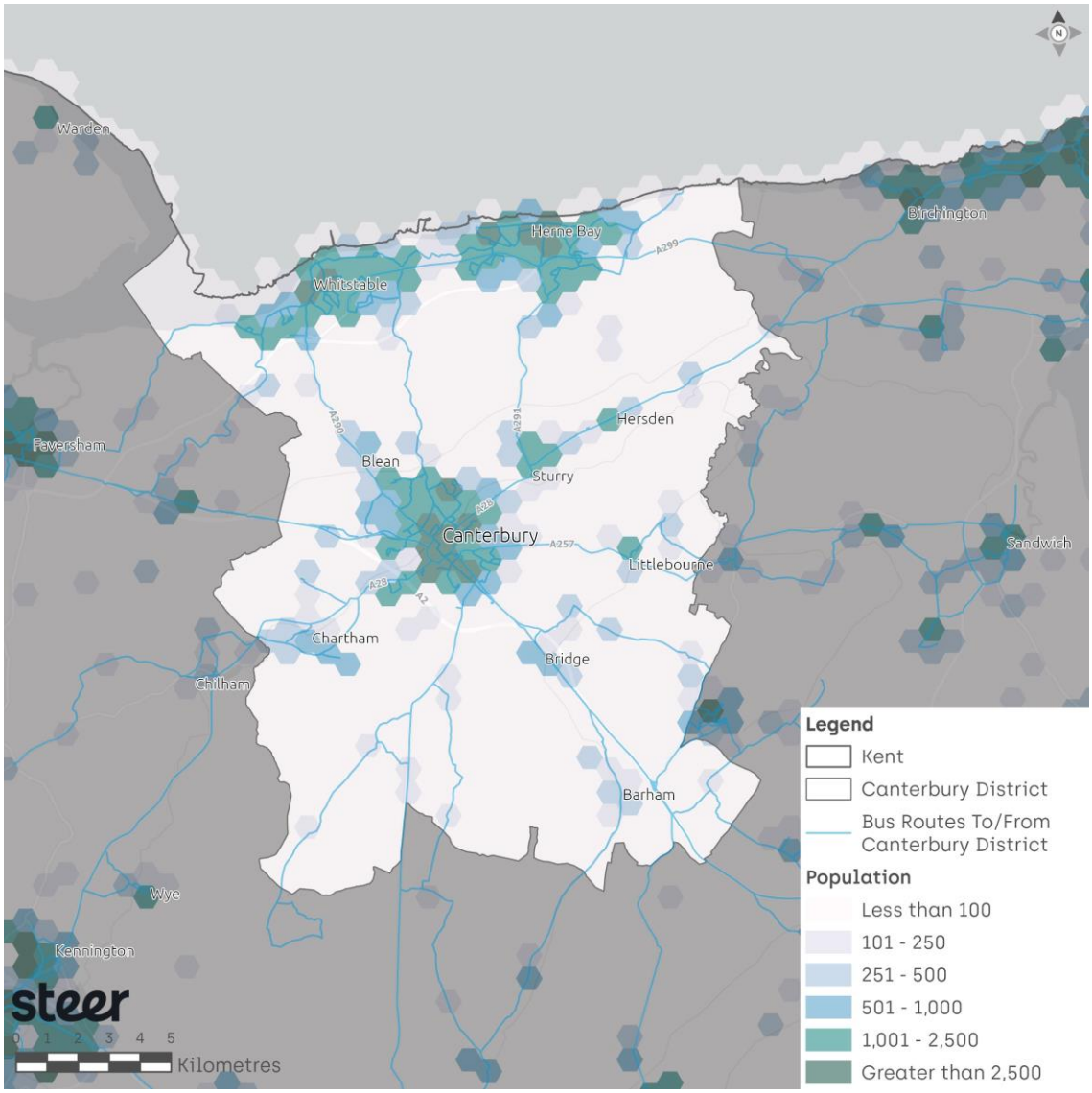
3 Understanding the study area

People

Where people live

3.1 The population of the Canterbury district is 170,000 (Census 2021) with the population focused on the city of Canterbury, and towns of Whitstable and Herne Bay. 82% of the population live within these three population centres.

Figure 3.1: Population density (2021)



3.2 Other smaller population centres include Sturry, Herden and Upstreet, Blean, Chartham, Littlebourne, Bridge and Barham. Approximately 8% of the population live within these settlements with the remaining 10% spread across the district.

3.3 Settlements are located on the main radial road network. The high percentage of population contained within the three key settlements presents opportunity for bus use with these concentrated populations supporting traditional bus operations which benefit from high population densities. How best to support the accessibility needs of those living outside these areas is a challenge.

Where people work

3.4 The highest concentrations of employment are focused on Canterbury city centre, Herne Bay and Whitstable. Key employment areas outside the district with direct bus and rail links to Canterbury include Ashford, Folkestone, Dover, Ramsgate and Margate.

3.5 These concentrated employment locations within Canterbury present an opportunity to be served by traditional bus services, connecting key population centres with key employment areas.

3.6 Considering region connectivity, there is opportunity to better integrate local bus services in Canterbury with the regional rail network, to ensure multi-modal trip making is a convenient and attractive alternative to car travel.

3.7 Interventions to make regional bus connectivity to nearby destinations such as Dover, Faversham and Sandwich may present an opportunity, particularly where bus is a more direct, frequent and cost-effective option. Pre-Covid these locations had higher bus flows from within the Canterbury district.

Figure 3.2: Employment density (2021)

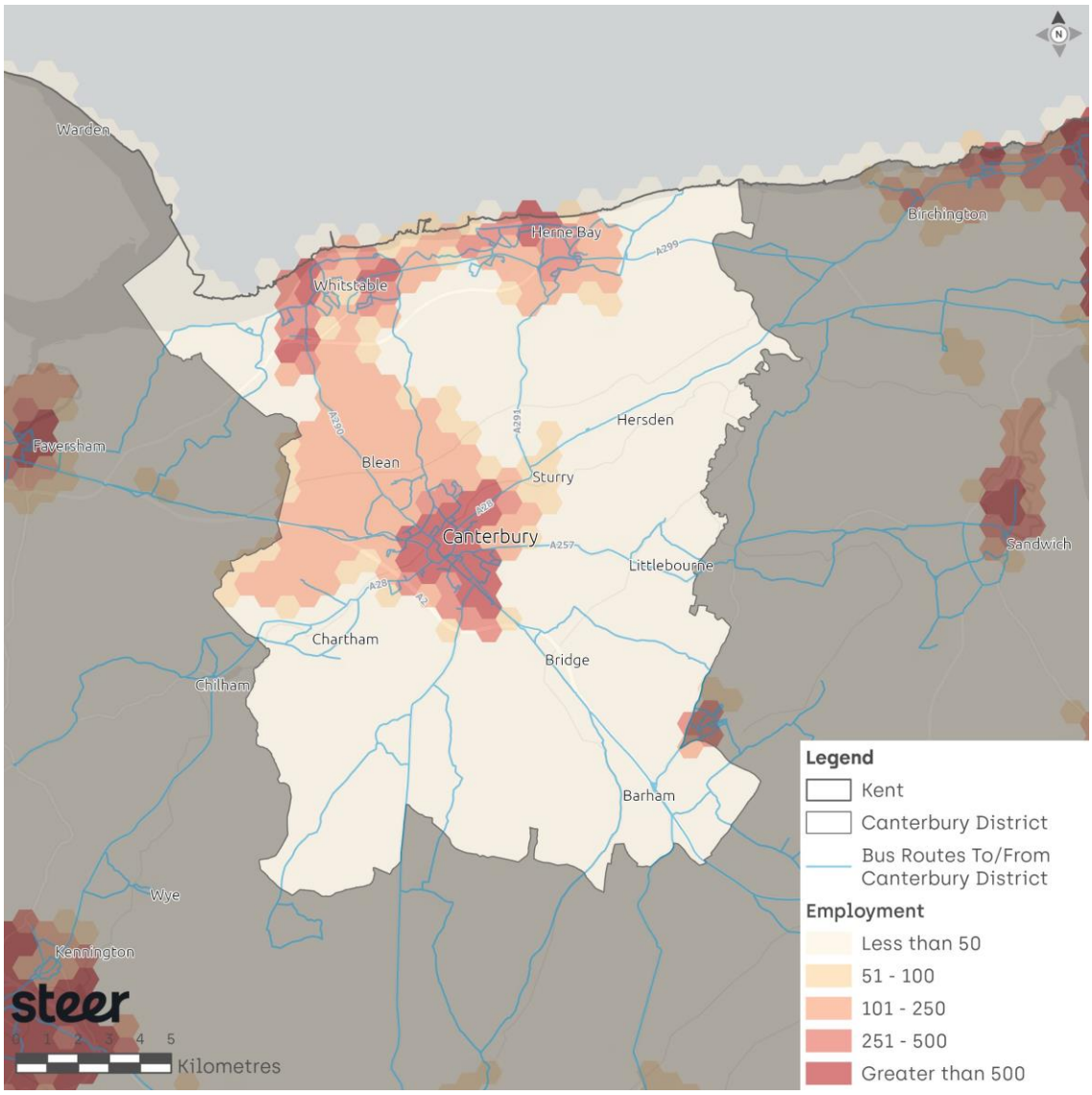


Figure 3.3: County-wide employment (2021)

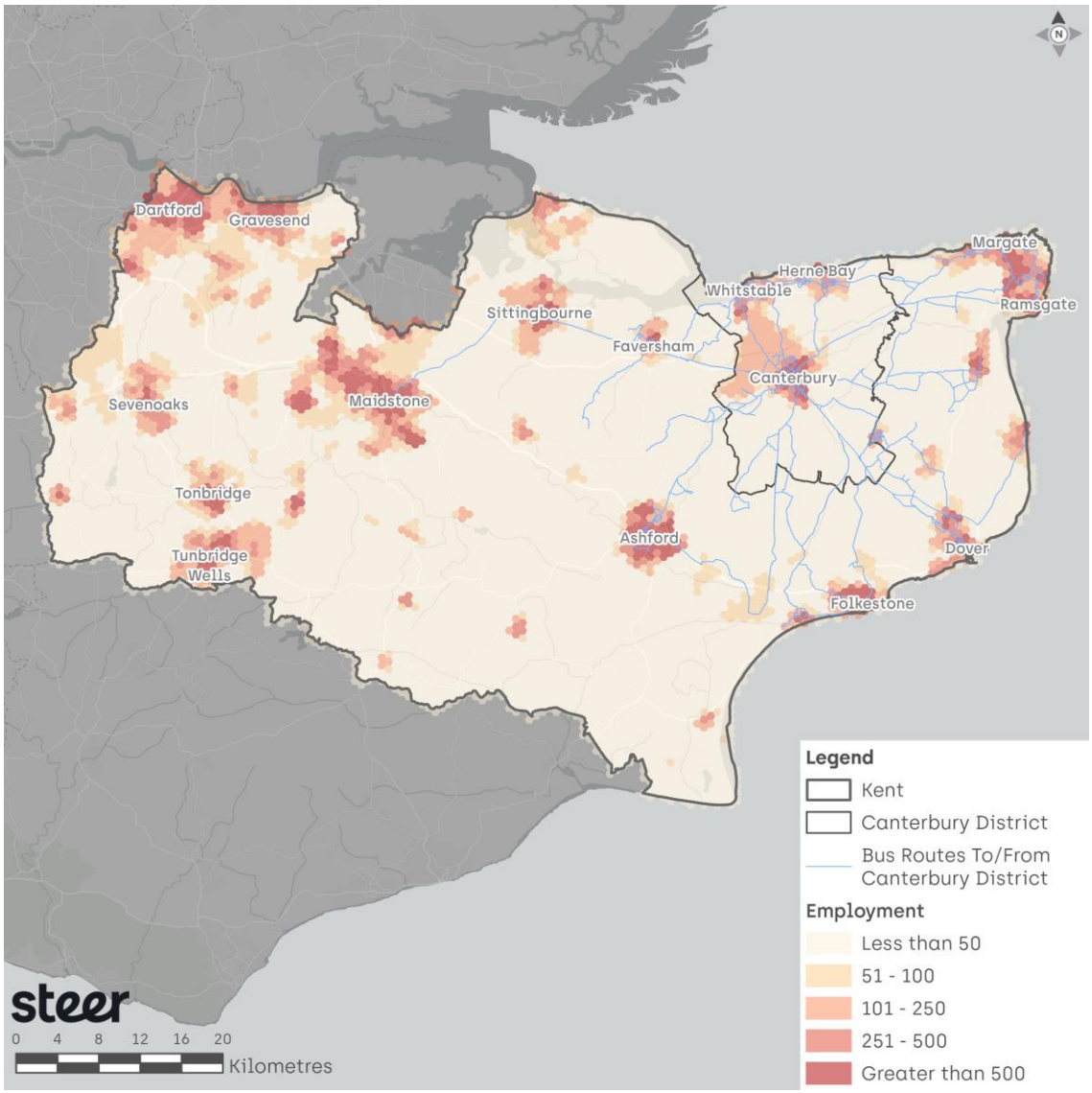
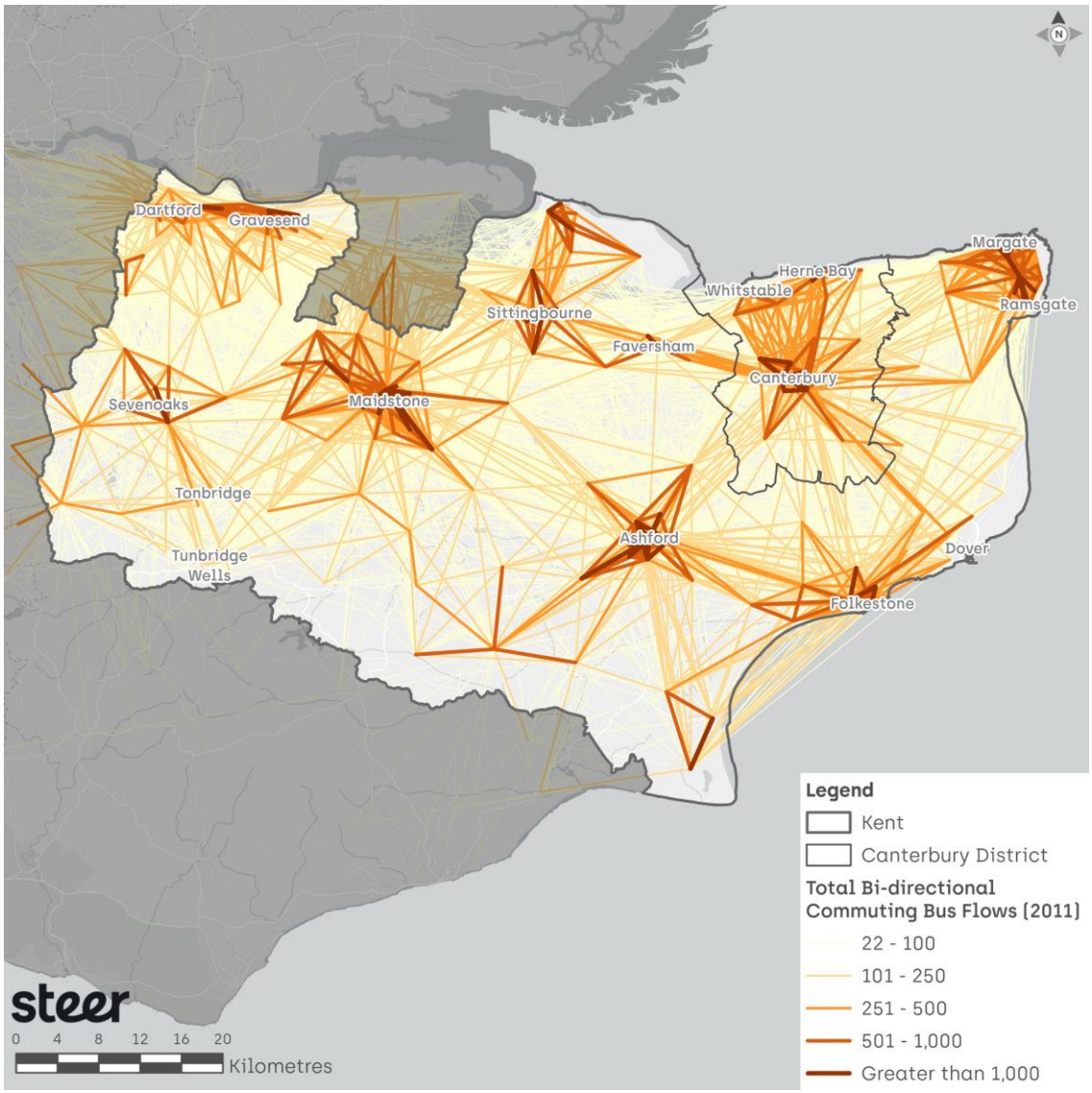


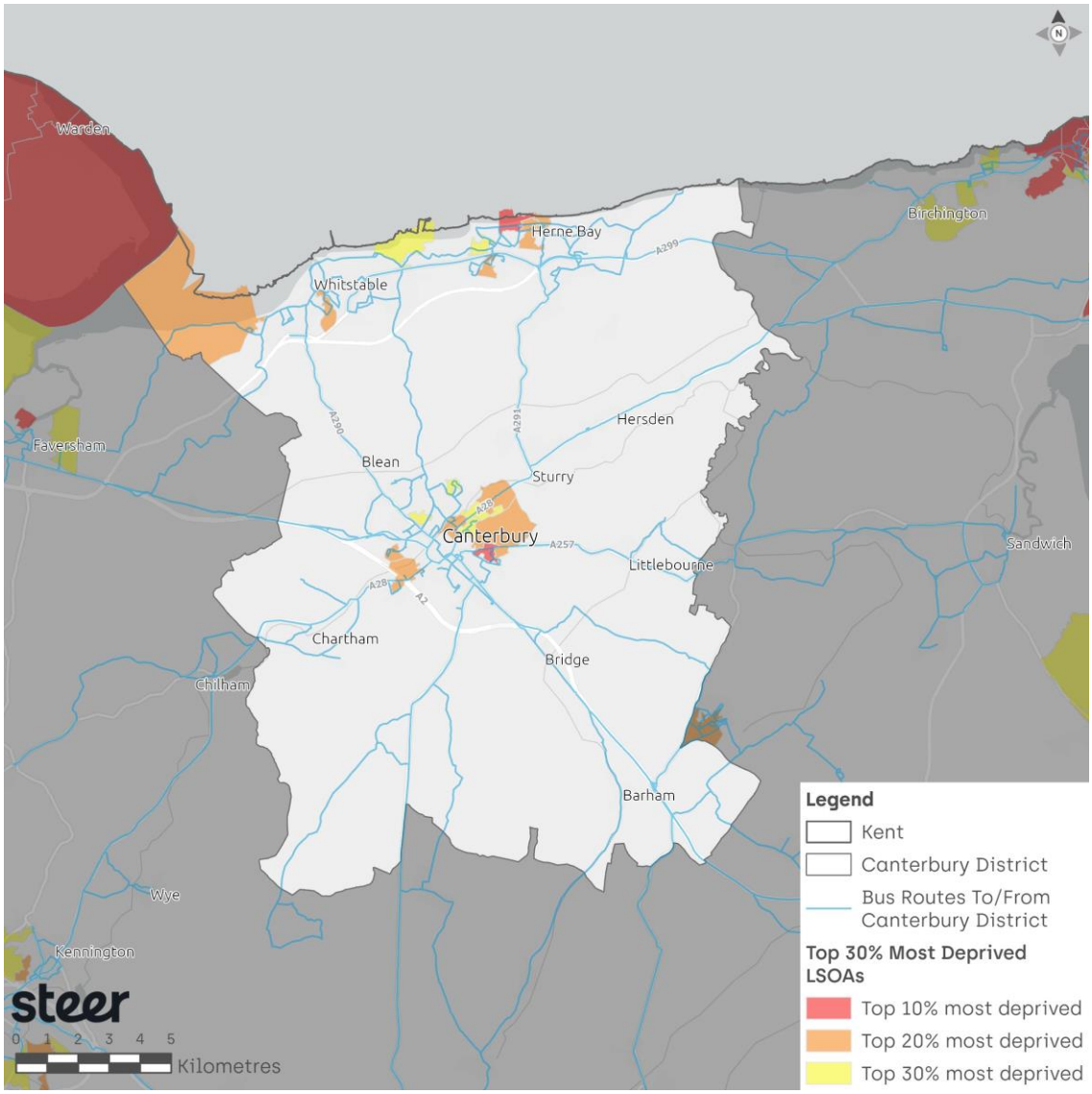
Figure 3.4: Regional travel to work bus flows (2011)



Deprivation

3.8 Areas of highest deprivation (top 10% most deprived in England) are located in Herne Bay and east Canterbury. Other areas in the top 20% most deprived located in east, west and central Canterbury, Herne Bay and south Whitstable.

Figure 3.5: Highest levels of deprivation in Canterbury district (2021)

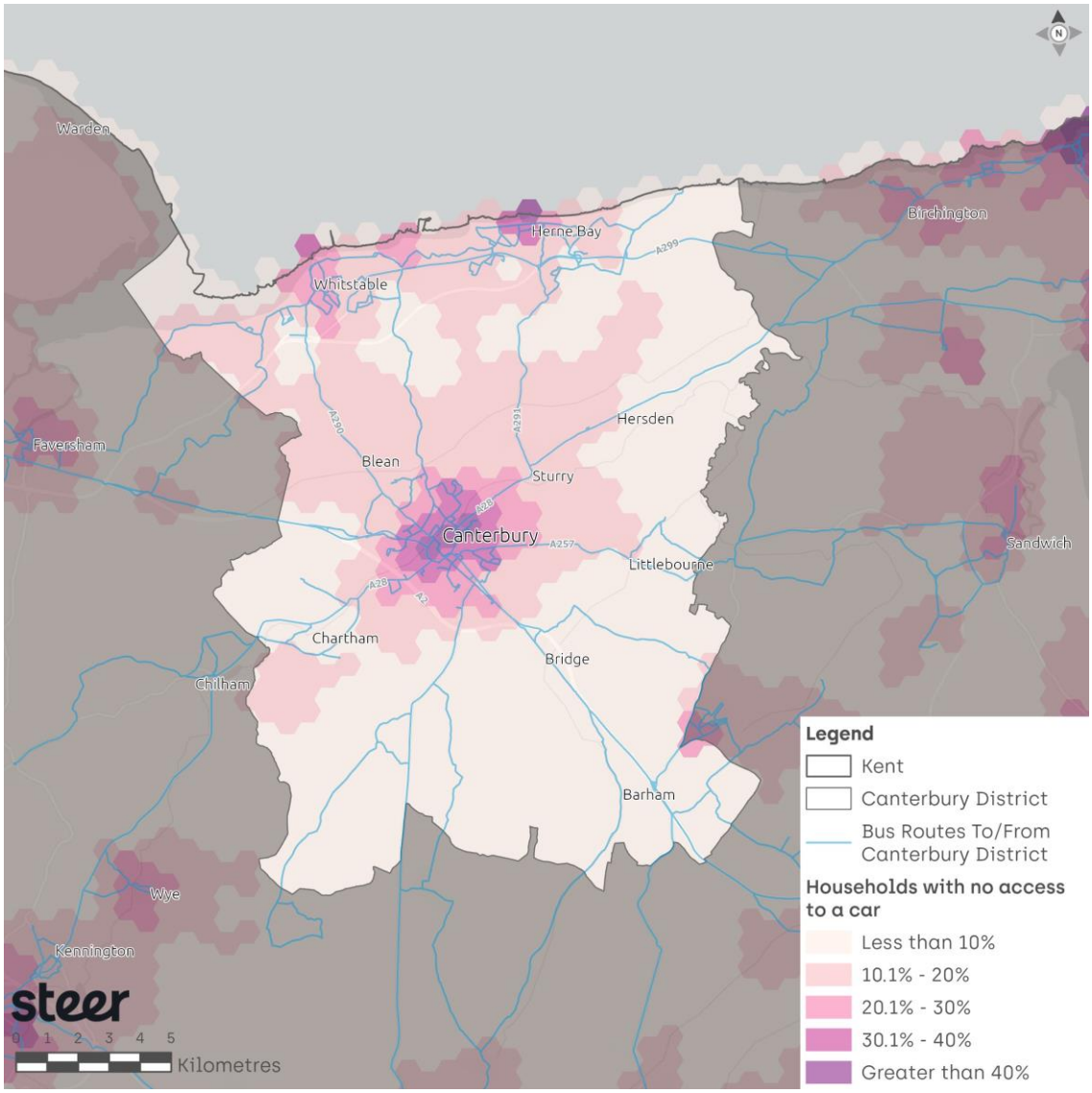


3.9 How to ensure all residents in the district of Canterbury have access to the opportunities they need including employment, education, training, retail and leisure, in a way they can afford will be a challenge for the strategy, particularly in the medium to long term should the current bus fare cap be removed, potentially exposing passengers to a higher cost of bus travel.

Car ownership

3.10 The highest proportions of households in the district with no access to a car or van are located in Canterbury city centre, Herne Bay and Whitstable where 40% or more of households do not have car/van access. Outside of these areas access to a vehicle is much higher with much of the district showing a level of car ownership of 80% or more.

Figure 3.6: Households with no access to a car (2021)

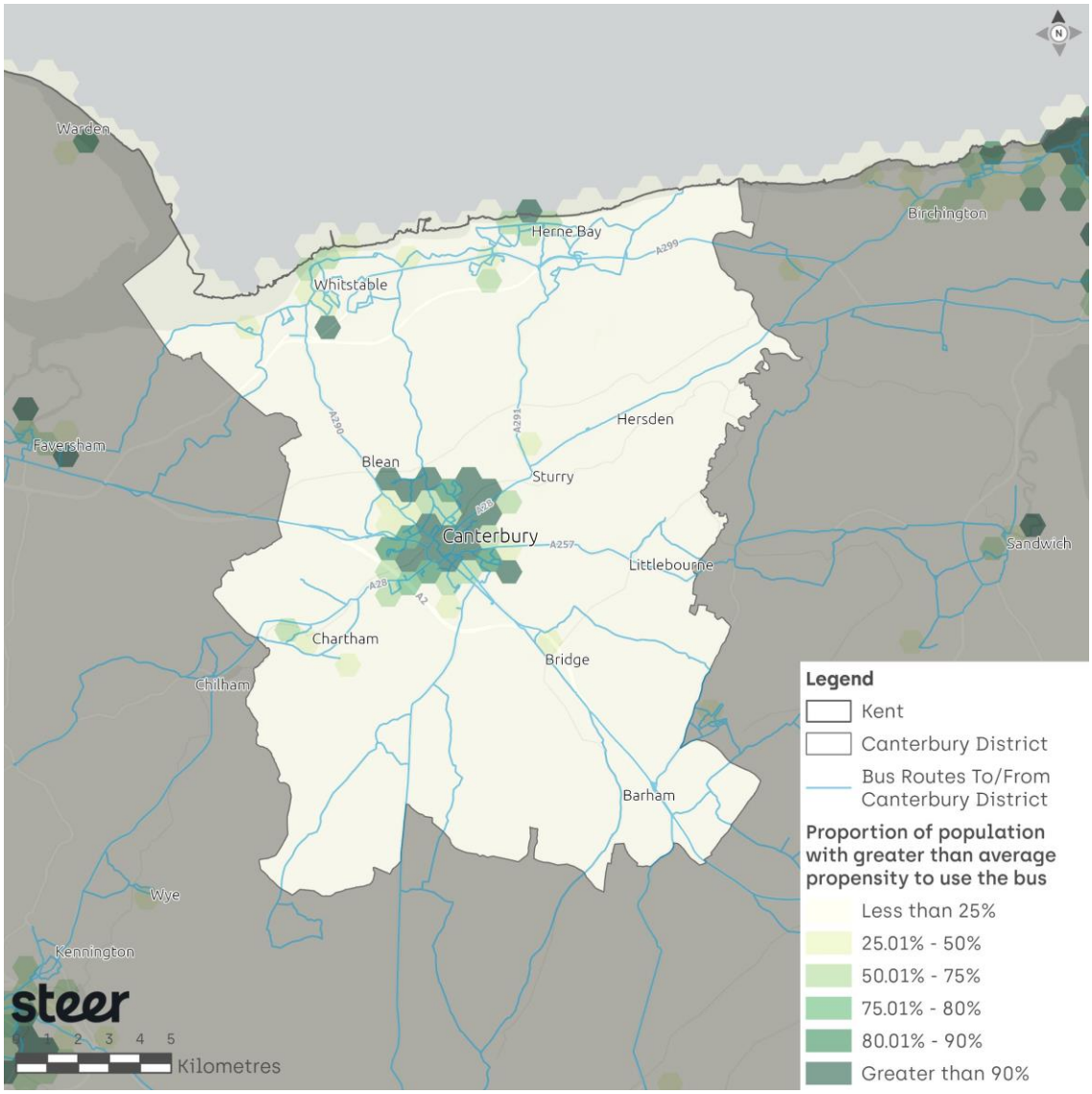


3.11 Ensuring bus travel provides a realistic alternative to private car use is important not only to those who rely on bus as a mode to access the services they need to do so, but also to encourage mode shift from private car use.

Propensity to use bus

3.12 Populations with the greatest propensity to use bus are located in parts of the city of Canterbury and Herne Bay. These areas are also where the highest population densities indicated good opportunity to increase bus patronage levels in these areas.

Figure 3.7: Propensity to use bus in Canterbury



Attitudes to bus use

3.13 Increasing bus patronage through audience strategy: Bus segmentation report (DfT, 2023) included a range of key insights which are important to consider during the development of Canterbury's bus strategy. The research showed that the most important factors when choosing a transport mode were **reliability**, **ease of completing journeys**, **safety**, **journey time**, and **flexibility.** The same is true in Canterbury where reliability has been identified as of particular local importance (as well as frequency and affordability).

3.14 A segmentation approach was developed, resulting in six segments. For all segments, as with the general population, reliability, journey time and flexibility were key areas that were

important and needed improving. However, there were other areas that were important factors to improve on for each segment.

Table 3.1: Bus Segmentation and applicability in Canterbury

Segment	Applicability in Canterbury
Sustainable urbanites characterised as being younger (typically under 55), more likely to live in cities or suburban areas, more likely to be in full-time work or studying. They are most likely to use the bus and most likely to want to use it again in the future. **Cost of transport**, **ticketing, payment**, **and environmental factors** were important drivers of transport choice. Improving these could be effective at driving bus patronage for this audience.	These priorities will be particularly relevant to the significant student population in the city and are likely to present 'quick wins' in terms of supporting patronage growth.
Pragmatic professionals were younger (typically under 55), comprised of more men, and more likely to be in full-time work. They were the segment with the second highest likelihood to use the bus, and the second most likely to use the bus in future. As with the general population, **reliability** and **journey time** were key areas for improvement in bus services, especially given their need for reliable work transport	To ensure that this key existing bus user group is supported and that patronage growth is developed, interventions to maximise reliability and reduce journey times will be important.
Anxious vulnerables were typically older (typically over 55) white women of lower social grades. They tended to be of households with lower-than average income levels, more likely to be unemployed or homemakers, and most likely to report a chronic health issue. Their current and future intended usage of the bus were in line with the national average. Compared to the rest of the population, the **risk from infection** and **protection from anti-social behaviour** on the bus were more important. Improving these could be effective in driving bus patronage for this audience.	To ensure that this bus user group is supported and patronage increase encouraged, interventions to tackle concerns around anti-social behaviour and risk of infection will be important. In Canterbury this is likely to include consideration of the relationship between school students and the general public, as well as perceptions of personal security at Canterbury bus station.
Open-minded potentials were typically older (typically over 55) white women of higher social grades. They were also more likely to live in rural areas. Their current levels of bus usage and future intent to use the bus were slightly lower than the national average. Perceptions of bus **reliability** and **journey time** were poorer among this audience compared to the general population. These could be priority areas of improvement to drive bus patronage for this audience.	Finding ways to provide reliable and improved journey times for those living in areas of the district removed from the higher frequency corridors will support this segment in Canterbury.

Segment	Applicability in Canterbury
Apprehensive avoiders were typically over 35 and from lower socio-economic backgrounds. They were also more likely to live in towns and villages than the national average. Their levels of bus usage and future intent to use the bus were far lower than the national average. For this audience, the bus performed far less strongly for i**nterconnectivity** and s**implicity of journey planning**. These factors were important in transport choice for this audience and could be priority areas of improvement to drive bus patronage.	Considering integration, journey planning information will be important to support patronage increase amongst this audience in Canterbury.
Car-loving critics were typically older men in villages or rural areas (typically aged over 55). Their levels of bus usage and future intent to use the bus were the lowest of all segments. As with the national average, **reliability**, **flexibility**, and **ease of journey** were important to them but bus performed poorly. However, unlike the national picture, little else was important to this audience in driving transport choice. This suggests that it would be difficult to design policies or messages to drive bus patronage among this audience.	Considering reliability, flexibility and ease of journeys will be important for this group in Canterbury though given the low proportion of the population likely to fall into this segment ,

Summary of challenges and opportunities - People

	Opportunities	Challenges
	✓	⚠
	The majority of the existing population lives in a small number of settlements (Canterbury, Whitstable, Herne Bay), which have high densities. This provides good potential to attract bus patronage at high volumes.	A small proportion of the population live in smaller, dispersed communities (either on the edge of town or in a more rural setting), which present a more challenging environment to offer commercial bus services with an attractive level of service. Encouraging bus use may also abstract from local active travel trips.
	Local employment is concentrated in these key settlements with key employment sites located on key corridors supporting potential for high patronage. Pre-covid, bus flows were also evident at a county level to Dover, Faversham and Sandwich, indicating potential for these flows to return.	Ensuring those in deprived communities have good levels of access to services they require at the times they need to travel particularly during evenings and Sundays is a challenge. In the medium to long term should the current bus fare cap be removed, those from the most deprived communities will be particularly impacted by a higher cost of bus travel.
	Low levels of car ownership in the centres of Canterbury, Whitstable and Herne Bay present an opportunity for promoting bus use and increased patronage.	Ensuring bus travel provides a realistic alternative to private car use will be a challenge to encourage mode shift from private car use and boost patronage.
	Areas of high propensity to use bus are also those where high population densities are present, creating good opportunities to increase patronage levels.	Areas of high propensity to use bus are also often where low levels of car ownership are present, meaning patronage increase may transfer directly to mode shift.

Place

Economy

3.21 The district employs 66,700 people, with key employment including retail (17.0%), education (17.8%) and health and social work (16.3%). Education and health have a higher percentage of people employed than the Kent average (9.3% and 13.4% respectively).

Table 3.2: Employee jobs by industrial groupings

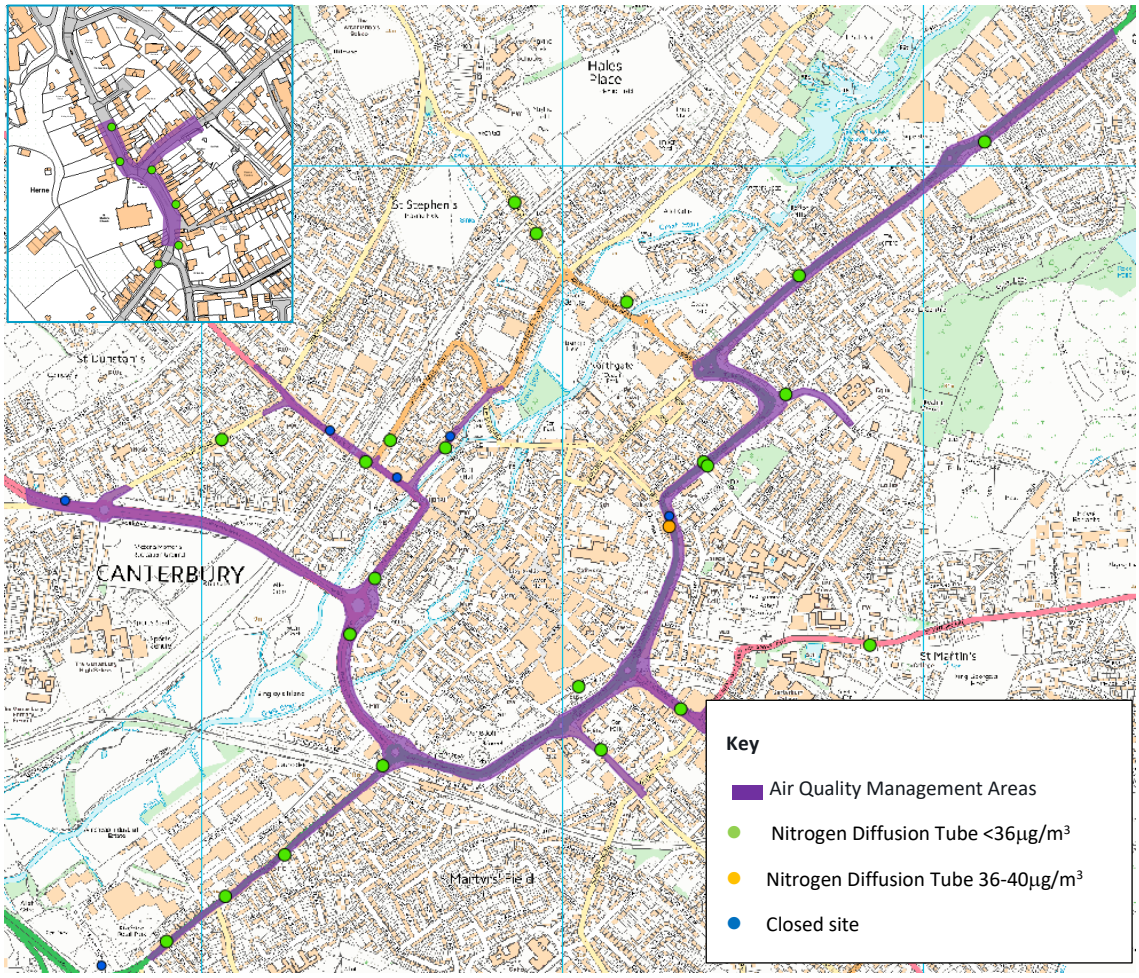
	Canterbury		Kent		Great Britain	
	Number	%	Number	%	Number	%
Agriculture, forestry and fishing	700	1.0%	10,000	1.6%	220,000	0.7%
Mining and quarrying	-	0.0%	400	0.1%	45,000	0.1%
Manufacturing	1,800	2.6%	35,000	5.5%	2,294,500	7.6%
Electricity, gas, steam and air conditioning supply	-	0.1%	1,800	0.3%	135,000	0.4%
Water supply; sewerage, waste management and remediation activities	300	0.4%	8,000	1.3%	215,000	0.7%
Construction	2,800	4.1%	49,000	7.7%	1,478,500	4.9%
Wholesale and retail trade; repair of motor vehicles and motorcycles	11,500	17.0%	106,500	16.7%	4,362,000	14.4%
Transportation and storage	1,100	1.7%	41,500	6.5%	1,531,000	5.0%
Accommodation and food service activities	5,500	8.1%	47,000	7.4%	2,279,500	7.5%
Information and communication	1,900	2.8%	16,000	2.5%	1,348,000	4.4%
Financial and insurance activities	2,300	3.3%	17,000	2.7%	1,079,500	3.6%
Real estate activities	800	1.1%	9,500	1.5%	545,000	1.8%
Professional, scientific and technical activities	3,500	5.2%	42,000	6.6%	2,694,000	8.9%
Administrative and support service activities	5,500	8.1%	60,500	9.5%	2,690,000	8.9%
Public administration and defence; compulsory social security	2,300	3.3%	24,000	3.8%	1,399,000	4.6%

	Canterbury		Kent		Great Britain	
	Number	%	Number	%	Number	%
Education	12,000	17.8%	59,000	9.3%	2,649,000	8.7%
Human health and social work activities	11,000	16.3%	85,500	13.4%	4,131,000	13.6%
Arts, entertainment and recreation	1,600	2.4%	12,500	2.0%	706,000	2.3%
Other service activities	2,100	3.1%	12,000	1.9%	579,500	1.9%
Total employees	**66,700**		**637,200**		**30,381,500**	

Air Quality

3.22 The district has two air quality management areas as detailed below, focussed on the road network – in Herne at the junction of A291 and School Lane, and the other consisting of the city centre ring road (Military Road, Broad Street, Rhodaus Town, Pin Hill, Rheims Way, St Peter's Place) as well as St Dunstans Street, and sections of the A2050 and A28.

Figure 3.8: Air Quality Management Areas in Canterbury district



3.23 Key challenges relate to managing traffic levels overall, but also reducing congestion and improving traffic flow in an urban environment where the road network is physically constrained and needs to cater for a wide range of road users including private vehicles, freight traffic, buses, cyclists and pedestrians.

Tourism and visitor economy

3.24 Canterbury city centre is the largest town centre in the District and, together with Maidstone, is the main shopping destination in Kent. After education, the retail sector provides the highest number of employment opportunities in the district. Whitefriars, home to a number of popular high street names, and a Fenwicks department store. The historic areas of the King's Mile and St Dunstan's have a good range of specialist and independent shops and boutiques.

3.25 The city is also a UNESCO World Heritage Site, the environmental quality of the city is very high, creating a desirable tourist offer. The city has around 7.2 million tourists per year, with an estimated spend of £45 million.

3.26 The impact of congestion, parking provision and associated impacts of quality of life and air quality have been recognised as key challenges to supporting the tourism and visitor economy. Reducing congestion and improving air quality is key aspiration to making the town centre a more attractive and desirable place to visit. Improvements to Park and Ride and the wider bus offer will play a key role in supporting sustainable access to Canterbury for visitors and addressing congestion and air quality issues.

3.27 Herne Bay and Whitstable are also popular tourist destinations. Herne Bay has a range of attractions in the sea front, however there is a desire to build on the popularity of this area and encourage higher footfall in the town centre. Issues around a limited nighttime economy have also been identified. Whitstable has a strong boutique retail offer. In both areas, there is a desire to improve sustainable transport options (including bus) to balance the convenience of car parking with a transition to more sustainable modes.

Summary of challenges and opportunities - Place

	Opportunities	Chanllenges
	✓	⚠
	Canterbury's economy has a significant proportion of retail and one which is important at a County level. Much of which is focussed on the city centre thus presents a good opportunity to be served by bus. The University of Kent, Christ Church University and the Kent and Canterbury Hospital are key employers with the universities having a significant student population. These provide opportunity in terms of patronage and managing sustainable access.	An increasing weekend (particularly Sunday) and evening economy is driving demand for travel outside the traditional peak periods, resulting in a need to reconsider service provision.
	Air quality issues are present on key bus corridors (A28, A2050, Old Dover Road, St Dunstans Street) and the ring road. Conversion to Low and Zero emission bus and mode shift to bus present opportunities to help address air quality issues.	Road space re-allocation may result in increased congestion, and poorer air quality, if not implemented as part of a wider strategy to reduce demand to the city centre by private car.
	Strong visitor economies in Canterbury, Whitstable and Herne Bay present good opportunities for increasing bus use and park and ride.	Expectations around service provision outside traditional peak times and changing patterns/behaviours (e.g. increased Sunday demand/reduced Saturday demand) present a challenge to current service provision.

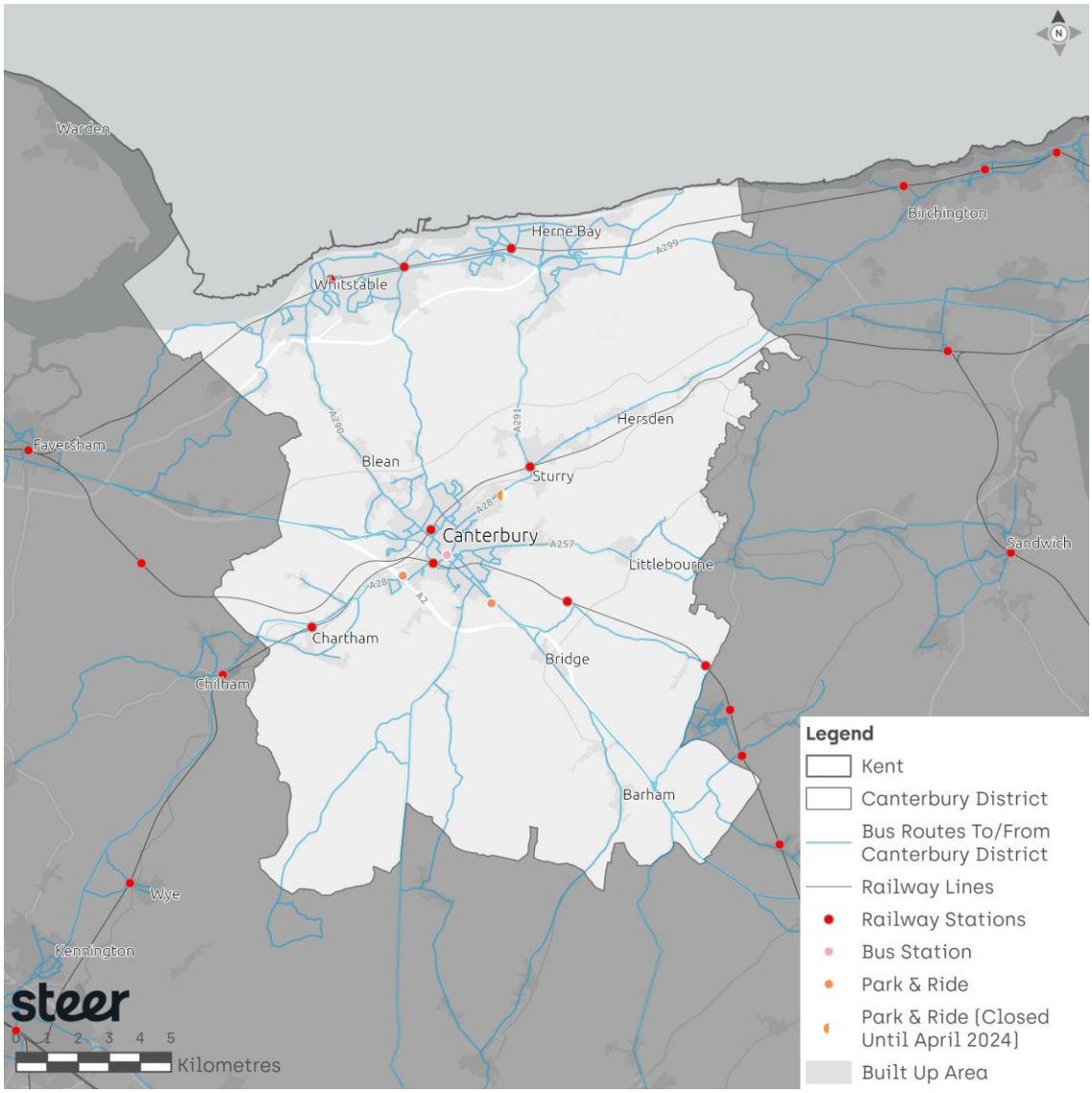
Connectivity

Canterbury's transport network

Overview

3.28 The local transport network in the district comprises of a road network that provides radial connectivity from Canterbury city centre to the surrounding area as well as a rail network that predominantly provides east-west connectivity along two axes – through Canterbury itself, as well as through Whitstable and Herne Bay.

Figure 3.9: Transport network overview



Canterbury's bus network

Bus services

3.2 An overview of bus services in the Canterbury District is shown in Table 3.3 and Table 3.4 and highlights which services provide connectivity to key destinations and frequency over key time periods. It can be seen that though the district is served by over 40 services, only four of these operate at a daytime frequency in excess of four buses per hour with two of these being Park and Ride services. Evening and Sunday services are much more limited.

Table 3.3: Bus service overview (October 2023)

		Morning Peak (08:00-09:00)	Daytime (13:00-14:00)	Evening (20:00-2100)	Sunday (10:00-11:00)	School Service
Route	**Route summary**	**Buses per hour**				**✓/✗**
High frequency						
P2	Canterbury, Wincheap	5	8	0	3	✗
P3	Canterbury New Dover Road Park and Ride, Canterbury Whitefriars	5	8	0	3	✗
Uni1	Canterbury, University of Kent	5	6	0	2	✓
Med frequency						
15	Canterbury, Barham Downs, Lydden, Temple Ewell, Buckland, Dover	3	3	1	1	✗
16	Canterbury, Bridge, Barham Downs, Hawkinge, Folkestone	3	3	1	2	✗
22	Canterbury, London Road Estate, Canterbury	4	4	1	1	✗
23	Canterbury, Spring Lane, Canterbury	3	3	1	1	✗

		Morning Peak (08:00-09:00)	Daytime (13:00-14:00)	Evening (20:00-2100)	Sunday (10:00-11:00)	School Service
Route	**Route summary**	**Buses per hour**				**✓/✗**
25	Canterbury, Kent and Canterbury Hospital, Canterbury	4	6	2	2	✗
Tria	Canterbury, University of Kent, Blean, Pean Hill, Whitstable, Tankerton, Swalecliffe, Herne Bay, Greenhill, Herne Bay, Beltinge, Herne, Sturry, Canterbury	4	4	2	3	✗
Uni1V	Canterbury, University of Kent	3	2	0	0	✓
Low frequency						
1, 1A, 1X	Canterbury, Wincheap, Thanington, Chartham, Chilham, Godmersham, Kennington, Ashford	2	1	0	0	✗
3A	Canterbury, Dunkirk, Boughton, Faversham, Bysing Wood, Faversham	1	0	0	0	✓
X3	Canterbury, Harbledown, Faversham, Bysing Wood, Teynham, Bapchild, Snipeshill, Sittingbourne, Stockbury, Maidstone	1	1	0	0	✗
5	Canterbury, Northgate, University of Kent, Radfall, Chestfield, Tankerton, Whitstable, Seasalter	1	1	0	0.5	✗
6	Canterbury, Sturry, Broad Oak, Herne, Broomfield, Hillsborough, Beltinge, Herne Bay, Greenhill	1	1	0	0	✗
8	Canterbury, Sturry, Hersden, Upstreet, Birchington, Westgate, Westbrook, Margate, Westwood	1	2	1	1	✗
8A	Canterbury, Sturry, Hersden, Upstreet, Birchington, Westgate, Westbrook, Margate, Cliftonville, Northdown, Broadstairs, Westwood	2	2	0	0	✗
11	Canterbury, Littlebourne, Wingham, Preston, Monkton, Minster, Westwood	1	0	0	0	✗
12	Canterbury, Barham Downs, Whitfield, Ringwould, Walmer, Deal	1	2	0	0	✗
17	Canterbury, Bridge, Kingston, Barham, Derringstone, Elham, Lyminge, Cheriton, Folkestone	1	1	0	0.5	✗

		Morning Peak (08:00-09:00)	Daytime (13:00-14:00)	Evening (20:00-2100)	Sunday (10:00-11:00)	School Service
Route	**Route summary**	**Buses per hour**				**✓/✗**
18	Canterbury, Nackington, Stelling Minnis, Lyminge, Sadnling, Saltwood, Hythe	1	1	0	0	✗
21	Canterbury, St Stephen's, Hales Place, St Stephen's, Canterbury	1	1	0	1	✗
21A	Canterbury, St Stephen's, Hales Place, St Stephen's, Canterbury	1	2	0	0	✗
43	Canterbury (St Anshelm's), Littlebourne, Wingham, Ash, Sandwich (Discovery park)	1	1	1	1	✗
44	Canterbury, Littlebourne, Wingham, Staple, Ash, Sandwich	1	0	0	0	✗
89	Canterbury, Bridge, Aylesham	1	0	0	0	✗
620	Canterbury, Nackington, Petham, Waltham, Petham, Nackington, Canterbury, St Stephen's, Waltham	1	1	0	0	✓
951	Canterbury - Simon Langton Boys' School Grounds	2	0	0	0	✓
954	Canterbury Bus Station - Archbishops School	1	0	0	0	✓
955	Canterbury Bus – Simon Langton's Girls School	2	0	0	0	✓
Uni2	Canterbury, University of Kent, Hales Place	1	2	2	0	✗
Infrequent						
3	Canterbury, Harbledown, Dunkirk, Boughton, Faversham, Bysing Wood	0	1	0	1	✗
8X	Canterbury, Sturry, Hersden, Upstreet, Birchington, Westgate, Margate	0	0	0	1	✗

		Morning Peak (08:00-09:00)	Daytime (13:00-14:00)	Evening (20:00-2100)	Sunday (10:00-11:00)	School Service
Route	**Route summary**	**Buses per hour**				**✓/✗**
9X	Canterbury, Sturry, Hersden, Upstreet, Nethercourt, Ramsgate, Dumpton, Broadstairs, Rumfields, Westwood	0	0	0	0	✗
18A	Canterbury, Nackington, Bossingham, Stelling Minnis, Stowting, Lympne, Sellindge, Brabourne, Willesborough, Ashford	0	0	0	0	✓
23A	Canterbury, Barton Estate, Spring Lane, Canterbury	0	1	0	1	✗
43A	Canterbury, Littlebourne, Wingham, Ash, Woodnesborough, Sandwich	0	0	0	0	✗
89B	Canterbury, Adisham, Ayelsham, Eythorne, Whitfield	0	0	0	0	✗
649	Northgate, Canterbury, Wincheap, St Dunstan's, Wincheap, Thanington	0	1	0	0	✗
653	Canterbury, Wincheap, Thanington, Chartham	0	0	0	0	✓
667	Canterbury, Wincheap, Thanington, Chartham, Chilham, Challock	0	1	0	0	✓
903	Herne Bay – Whitstable – Blean - Canterbury St Anselm's School Grounds	0	0	0	0	✓
904	Herne Bay – Whitstable – Blean - Nackington Simon Langton Boys' School Grounds	0	0	0	0	✓
905	Herne Bay - Whitstable – Blean - Canterbury Ivy Lane	0	0	0	0	✗
906	Herne Bay – Whitstable – Blean - Canterbury Simon Langton Girls' School	0	0	0	0	✓
908	Herne Bay – Broomfield – Sturry - Canterbury Simon Langton Girls' School	0	0	0	0	✓
911	Herne Bay – Broomfield – Sturry - Simon Langton Boys' School Grounds	0	0	0	0	✓

		Morning Peak (08:00-09:00)	Daytime (13:00-14:00)	Evening (20:00-2100)	Sunday (10:00-11:00)	School Service
Route	**Route summary**	**Buses per hour**				**✓/✗**
912	Herne Bay – Broomfield – Sturry - Canterbury Simon Langton Girls' School	0	0	0	0	✓
913	Whitstable – Blean – Canterbury Schools	0	0	0	0	✓
914	Whitstable – Radfall - Tyler Hill - Canterbury	0	0	0	0	✓
915	Whitstable – Radfall - Tyler Hill – Canterbury	0	0	0	0	✓
916	Whitstable – Radfall - Tyler Hill - Canterbuy	0	0	0	0	✓
917	Herne Bay – Radfall - Broomfield – Tyler Hill - Canterbury	0	0	0	0	✓
919	Herne Bay – Broomfield – Sturry - Canterbury	0	0	0	0	✓
953	Canterbury Academy – Canterbury Bus Station	0	0	0	0	✓
956	Canterbury – Sturry - Westbere	0	0	0	0	✓
983	Canterbury– Aylesham – Dover Pencester Road	0	0	0	0	✓
Uni2V	Canterbury, University of Kent, Hales Place	0	2	0	0	✗

3.3 It can be seen in Table 3.4 that most services stop at Canterbury bus station and the Tria service provides key connectivity between a range of settlements (Canterbury, Blean, Sturry, Heren Bay, Whistable) and key points of interest (Canterbury Bus Station, Canterbury East Station, University of Kent, and Sturry Business Park).

Table 3.4: Services by key locations

Route	Canterbury West Station	Canterbury East Station	Kent & Canterbury Hospital	University of Kent	Wincheap Industrial Estate	Sturry Business Park	Canterbury Bus Station	Whitstable	Herne Bay	Hersden	Sturry	Blean	Littlebourne	Bridge	Barham	Chartham
	Key locations															
High frequency																
P2		✓														
P3																
Uni1				✓			✓									
Med frequency																
15							✓								✓	
16							✓								✓	
22		✓					✓									
23							✓									
25			✓				✓									
Tria		✓		✓		✓	✓	✓	✓		✓	✓				
Uni1V		✓		✓			✓									
Low frequency																
1, 1A, 1X		✓			✓		✓									✓
3A		✓					✓									

Route	Canterbury West Station	Canterbury East Station	Kent & Canterbury Hospital	University of Kent	Wincheap Industrial Estate	Sturry Business Park	Canterbury Bus Station	Whitstable	Herne Bay	Hersden	Sturry	Blean	Littlebourne	Bridge	Barham	Chartham
	Key locations															
X3		✓					✓									
5				✓			✓	✓								
6						✓	✓		✓		✓					
8						✓	✓			✓	✓					
8A						✓	✓			✓	✓					
11							✓						✓			
12							✓								✓	
17							✓							✓	✓	
18							✓									
21							✓									
21A							✓									
43							✓						✓			
44							✓						✓			
89							✓							✓	✓	
620		✓					✓									
951							✓									

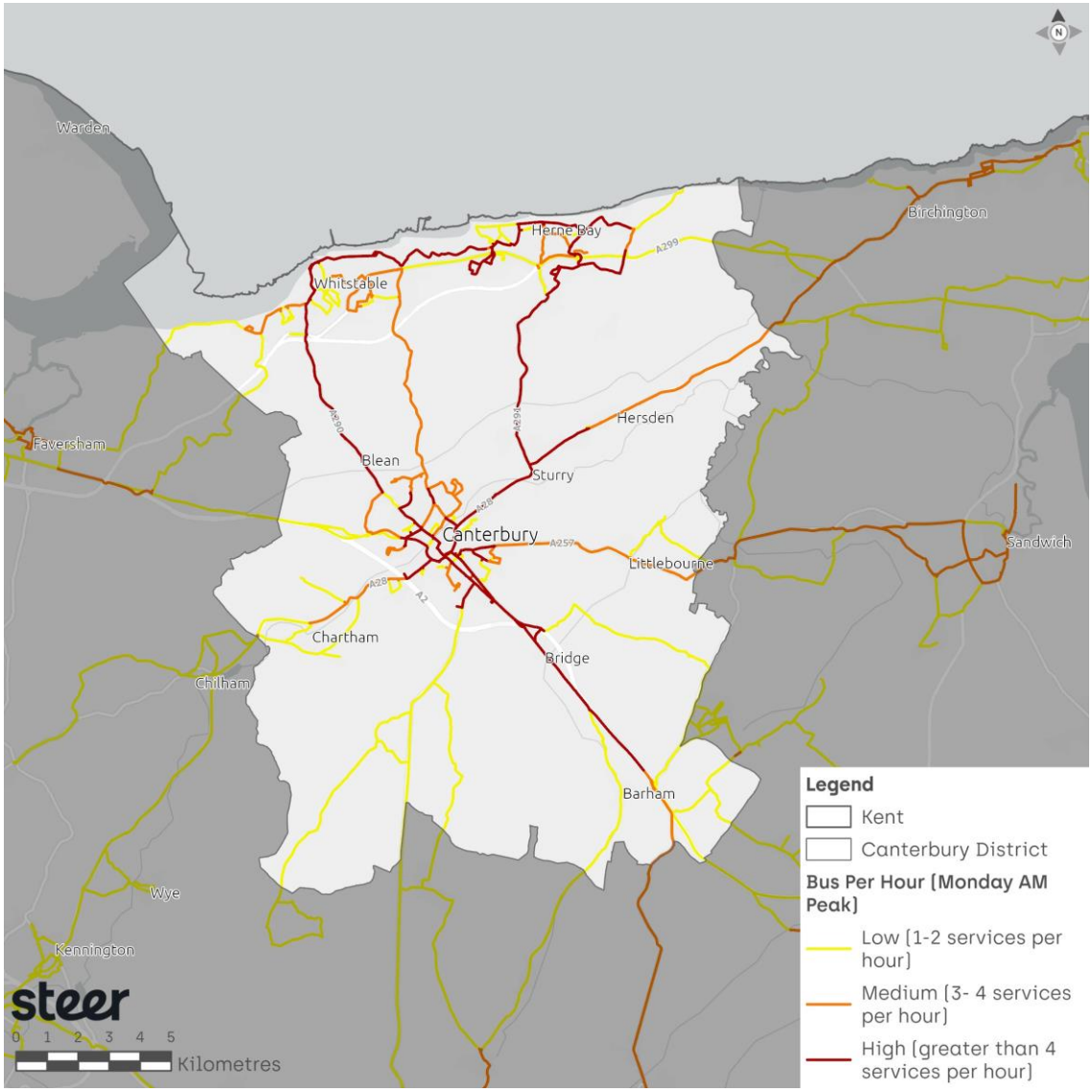
Route	Canterbury West Station	Canterbury East Station	Kent & Canterbury Hospital	University of Kent	Wincheap Industrial Estate	Sturry Business Park	Canterbury Bus Station	Whitstable	Herne Bay	Hersden	Sturry	Blean	Littlebourne	Bridge	Barham	Chartham
	Key locations															
954							✓									
955							✓									
Uni2	✓	✓		✓			✓									
Infrequent																
3		✓					✓									
8X						✓	✓			✓	✓					
9X						✓	✓			✓	✓					
18A							✓									
23A							✓									
43A							✓						✓			
89B							✓							✓	✓	
649		✓														
653					✓											✓
667		✓			✓		✓									✓
903		✓						✓	✓			✓				
904		✓						✓	✓			✓				

Route	Key locations															
	Canterbury West Station	Canterbury East Station	Kent & Canterbury Hospital	University of Kent	Wincheap Industrial Estate	Sturry Business Park	Canterbury Bus Station	Whitstable	Herne Bay	Hersden	Sturry	Blean	Littlebourne	Bridge	Barham	Chartham
905		✓						✓	✓			✓				
906		✓						✓	✓			✓				
908									✓		✓					
911									✓		✓					
912									✓		✓					
913		✓						✓				✓				
914							✓	✓								
915								✓								
916							✓	✓								
917									✓							
919									✓		✓					
953		✓					✓									
956							✓				✓					
983							✓									
Uni2V	✓	✓		✓			✓									

Peak vs off peak services

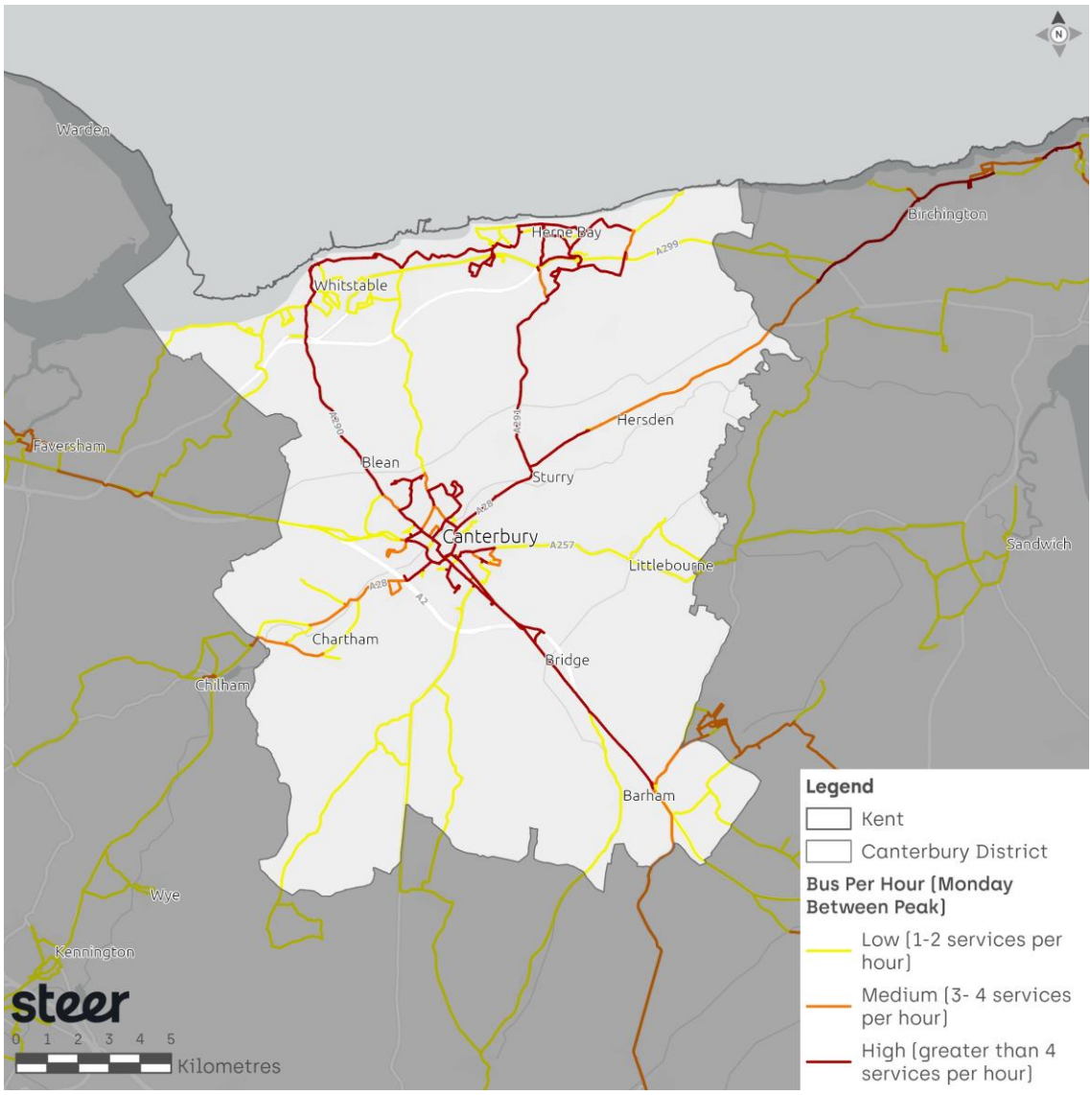
3.4 The peak time bus network in the Canterbury district includes corridors with a bus frequency of greater than one every 15 minutes (4 per hour) which connect Canterbury city centre with Blean, Whitstable, Herne Bay and Sturry to the north and Bridge in the south. During the morning peak between 3 and 4 services per hour serve Chartham in the west, Tyler Hill in the north, Hersden in the northwest and Littlebourne in the east.

Figure 3.10: Monday AM peak frequency



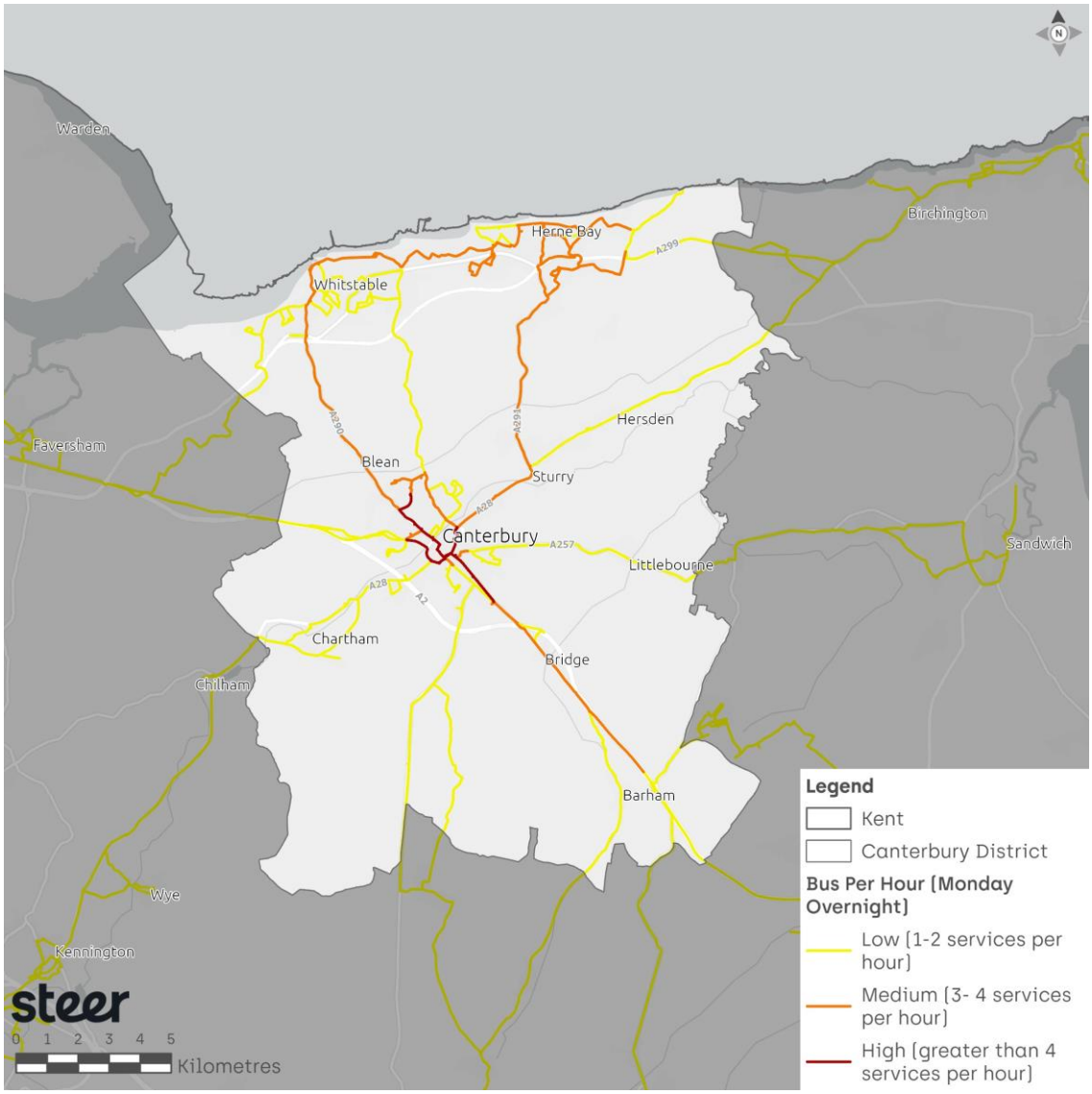
3.5 During the inter-peak, services to Tyler Hill and Littlebourne become less frequent.

Figure 3.11: Monday interpeak frequency



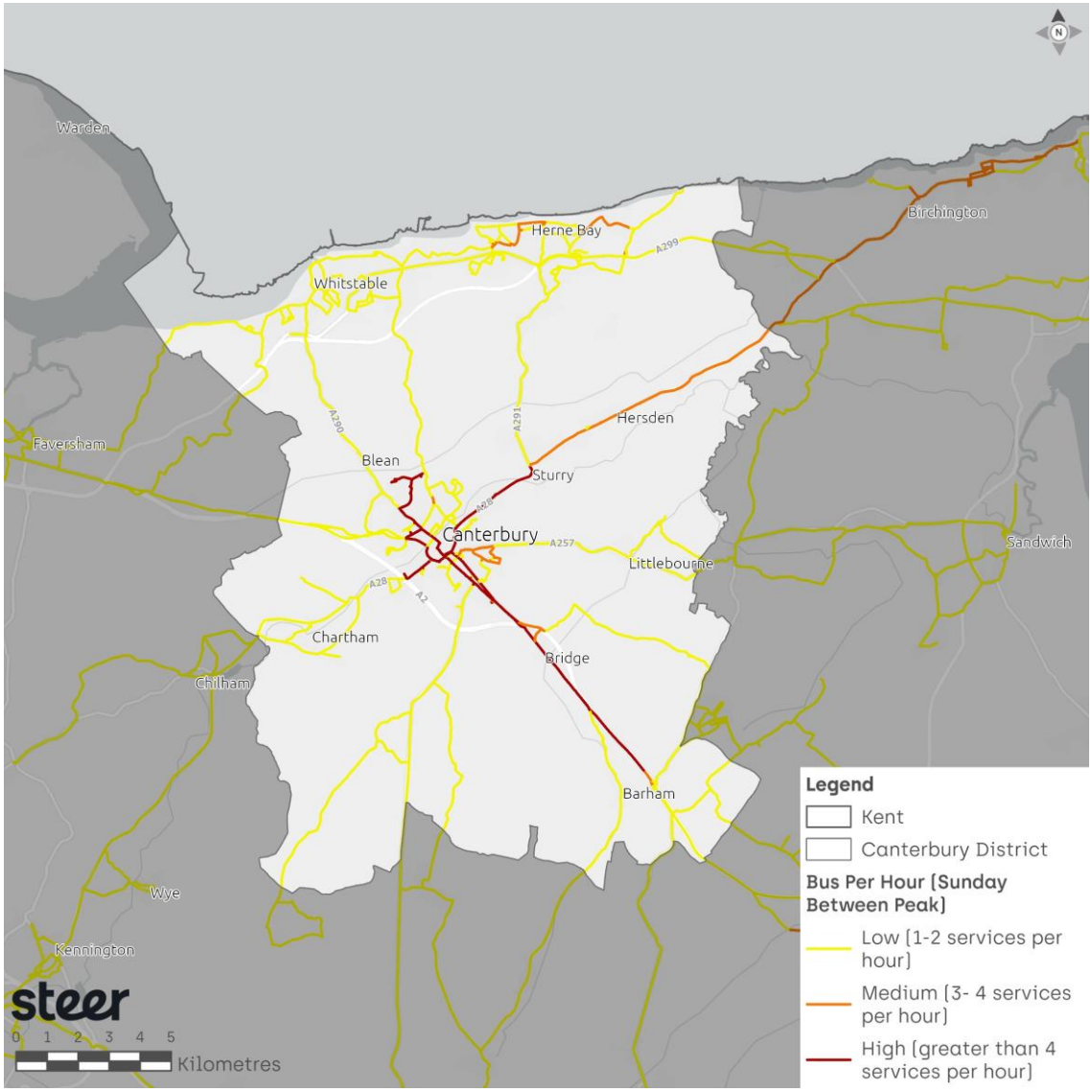
3.6 Evening service frequencies are more limited, with links to and between Canterbury, Whitstable and Herne Bay and Canterbury and Bridge reduced to a frequency of between 3 and 4 services an hour and other corridors between 1 and 2 services per hour.

Figure 3.12: Monday evening frequency



3.7 Sunday services across the network operate on a low frequency (1-2 buses per hour) with the only high frequency services between Canterbury and Sturry and Canterbury and Bridge.

Figure 3.13: Sunday daytime frequency



3.8 Considering the network at these times highlights lack of consistent service levels across the day and week, which are particularly limited in terms of the nighttime and Sunday economy.

Access to the bus network – weekday peak

3.9 Considering the proportion of the population within 400m of Canterbury's bus network during the AM peak (as seen in Figure 3.15), 64% of the population are within 400m of a high frequency corridor (greater than 4 buses per hour). It can be seen in Figure 3.14 that this drops to 16% on a weekday evening and 27% on a Sunday daytime. At all time periods, between 8% and 9% either have no access or access to only a very infrequent service of less than one bus per hour.

Figure 3.14: Proportion of Canterbury population within 400m of high, medium, low and infrequent bus corridors

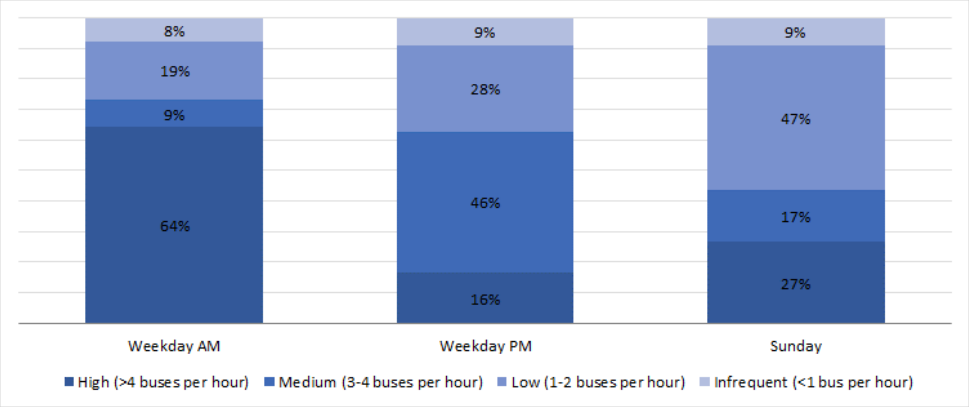
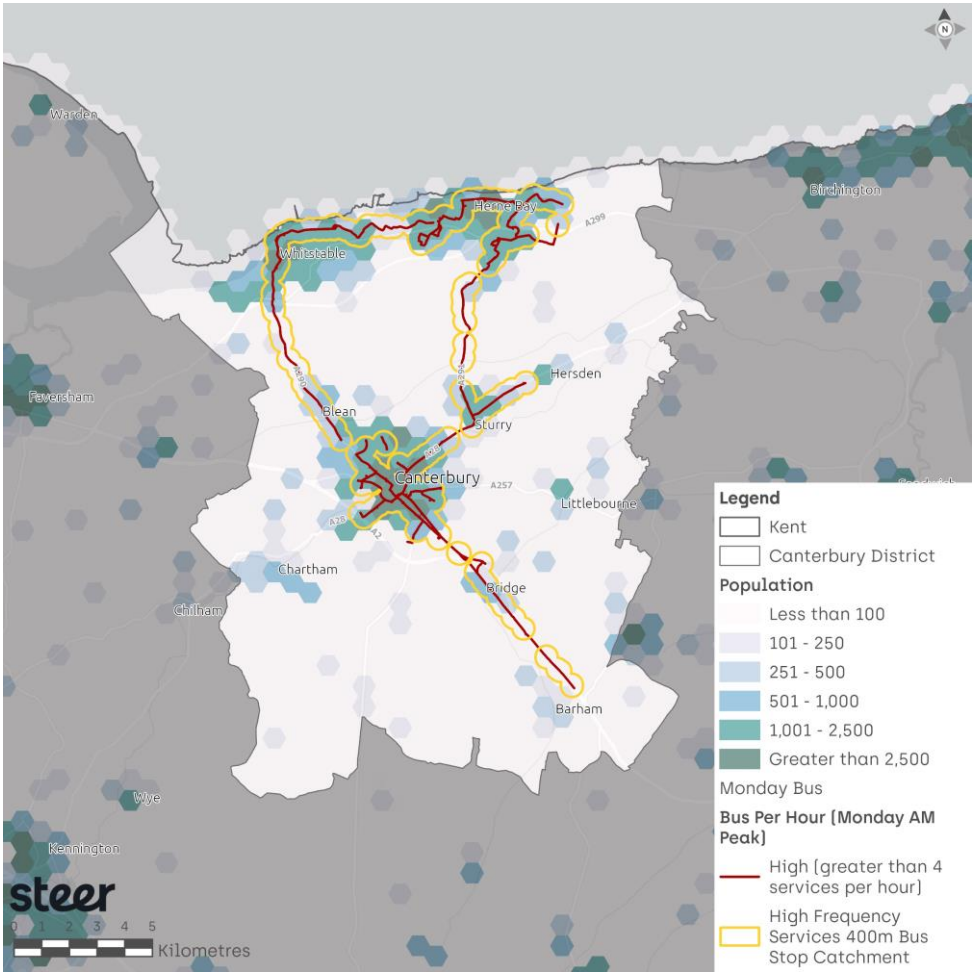


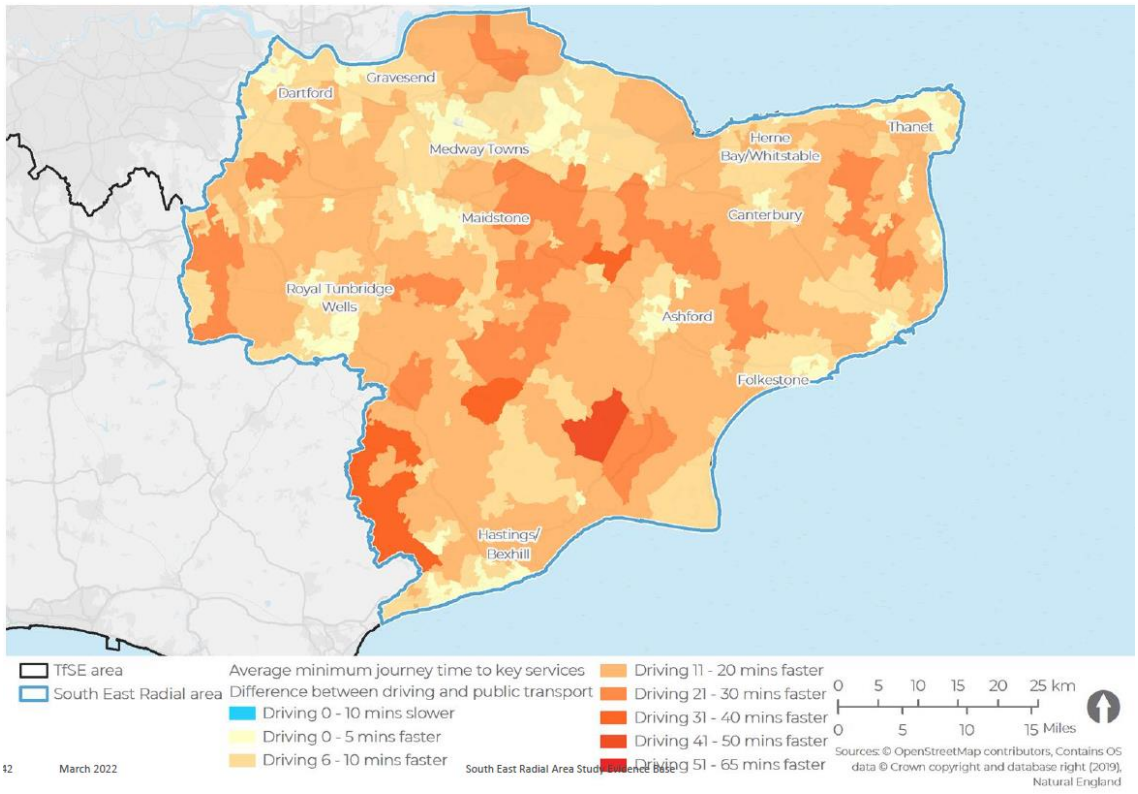
Figure 3.15: Catchment of peak high frequency (5+ buses per hour)



Journey times

3.10 Considering the difference between accessibility by car and by walking & public transport it can be seen that public transport does not present a faster option than car, presenting a challenge to its attractiveness. Improving bus journey times and reliability present an opportunity to improve the attractiveness in relation to car. In the area immediately around Canterbury city centre, evidence suggests that journey time improvements of between 1 and 10 minutes would allow the bus to be more competitive with the private car.

Figure 3.16: Difference in average journey times to key services (mins) – Car vs walking & public transport

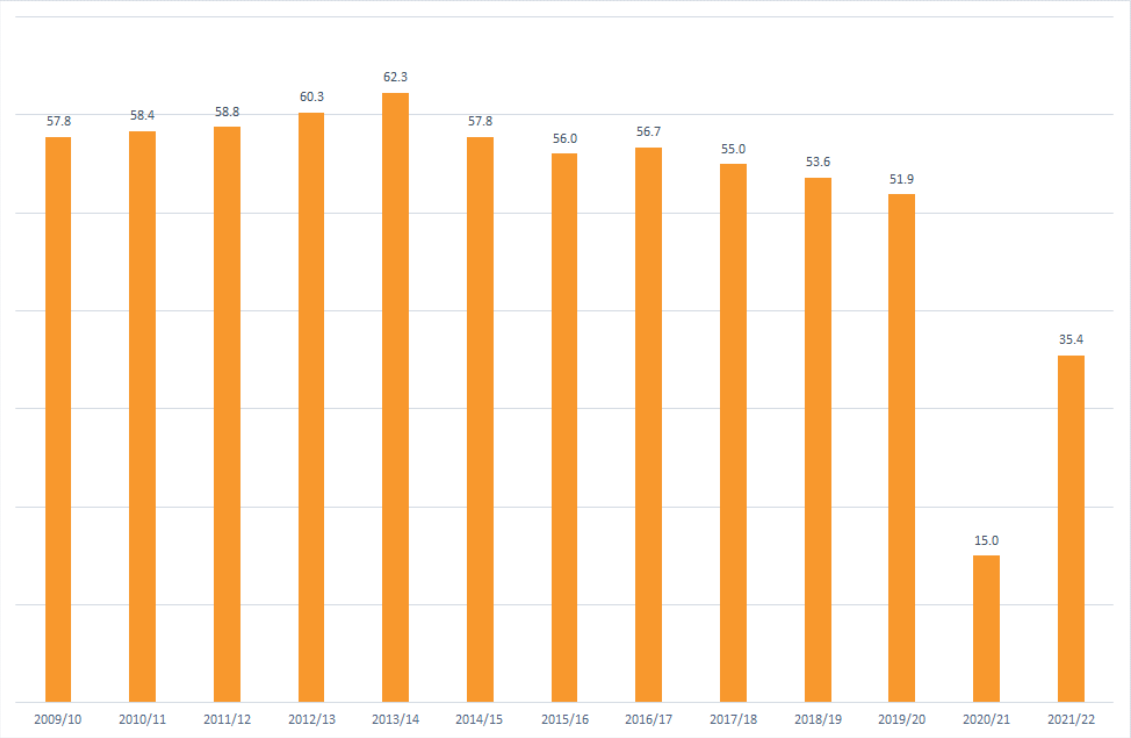


Source: Evidence Base Report – Southeast Radial, TfSE, 2021

Bus patronage

3.11 Bus patronage in Kent reached a peak of 62.3m passenger journeys per annum in 2013/14 before beginning a steady decline between 2013/14 and 2019/20 where it dropped to 51.9m passenger journeys per annum. It fell to 15m passenger journeys per annum during the pandemic and latest data for 2021/22 indicates this has risen to 35.4m.

Figure 3.17: Bus patronage – 2009/10 to 2021/22 – Kent



3.12 Bus patronage in Canterbury doubled between 2005 and 2015 which coincided with the implementation of bus priority measures and the introduction of the Quality Bus Partnership, which demonstrates that it is possible to increase the mode share if appropriate measures are in place.

3.13 Patronage levels in Canterbury for 2022/2023 indicate approximately 7 million trips from Stagecoach services operating out of Herne Bay depot over a 12-month period.

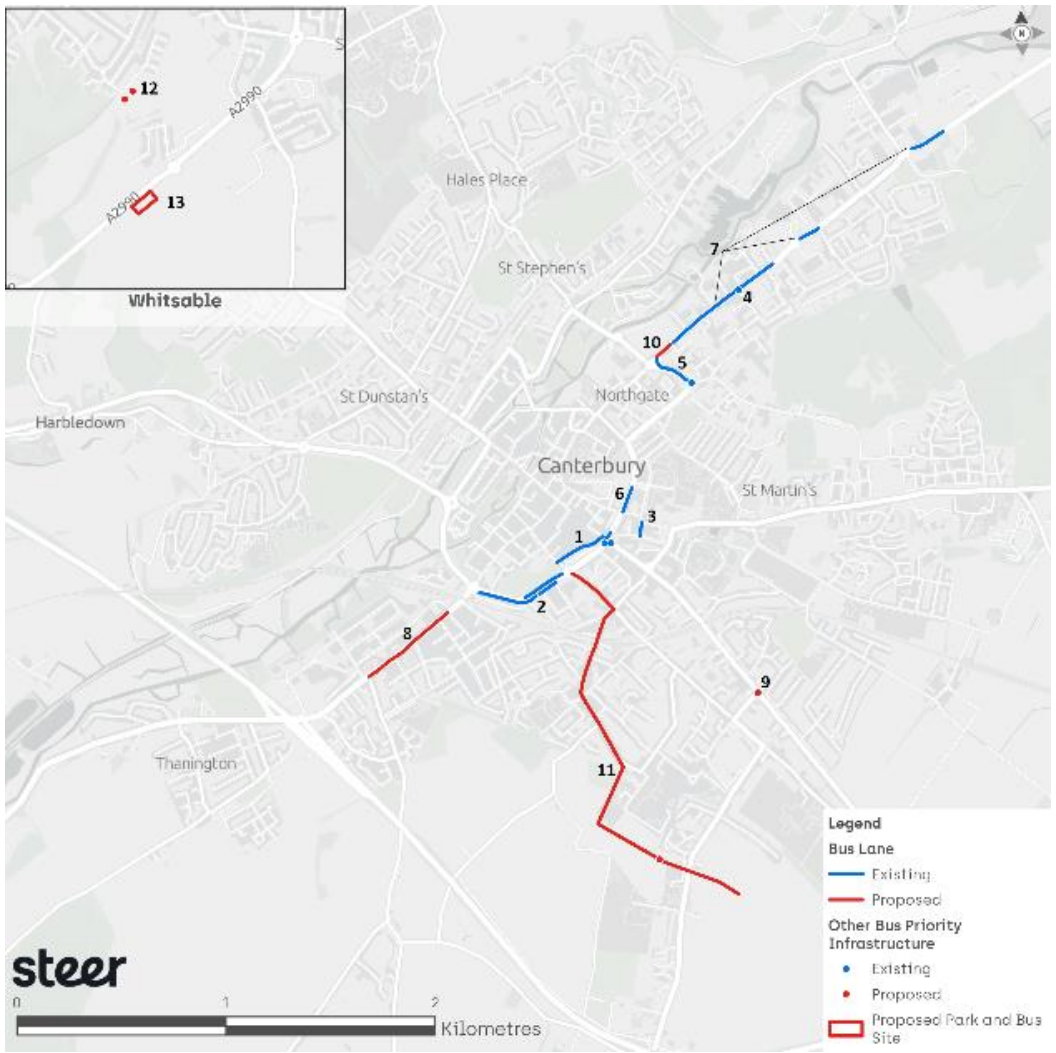
3.14 Park & Ride, the Triangle (including No.4 and No.6), Unibus and No.3 to Faversham show some of the highest patronage levels.

Existing and committed bus infrastructure

3.15 Kent County Council and Canterbury City Council have implemented or committed to implementing a range of bus infrastructure in the district. This is summarised below:

Table 3.5: Existing and proposed bus infrastructure in Canterbury district

Canterbury
Existing schemes
1.St George's Lane: Bus, taxi and cycle only road; Bus priority traffic signals triggered by loop *(not in operation)*
2.Pinhill/Rhodaus Town: Bus lane
3.Lower Chantry Lane: Bus lane
4.Brymore Road: Bus gate (7.30 to 9.30 signed only)
5.Tourtell Road: Bus priority traffic signals to enable bus to turn right at roundabout
6.Broad Street: Bus lane between Lady Wooton's Garden and Burgate
7.Sturry Road: Bus lane between Starle Close and Brymore Road; Bus lane between Brymore Road and Riverdale Road; Bus lane opposite Marshwood Close; Bus lane between Stour crescent & Sturry Road P&R entrance
Proposed schemes
8.Wincheap: Proposed eastbound contraflow bus lane (between Hollow Lane and Tudor Road)
9.New Dover Road (at St Lawrence Road): Bus priority measure associated with South Canterbury development (no detail)
10.Sturry Road: Proposed extension to existing bus lane between Starle Close and Tourtel Road
11. Nunnery Fields/South Canterbury Road/New carriageway around Kent and Canterbury Hospital crossing B2068: Proposed Fastbus on existing highway
Whitstable
Proposed schemes
12.St Andrews Close: Bus gate onto Saddleton Road **13.Whitstable Park and Bus:** Thanet Way between Elgar Avenue and A299 junction



Ticket costs

3.16 Bus ticket fares for the Canterbury area and for routes between Canterbury and adjacent areas are presented below.

3.17 As of September 2023, single journey fares are subject to the **£2 Bus Fare Cap** and therefore limited at £2. This does not apply to return tickets, however return journeys can be made using two single journey fares. The £2 fare is applicable in all cases including concessions.

3.18 Present typical journey fares for journeys within Canterbury and between Canterbury and adjacent areas can be seen in Table 3.6 and Table 3.7.

Table 3.6: Bus fares for using Stagecoach to travel between Canterbury Bus Station and Canterbury Hospital

Ticket Type	User	Time	Price	Availability
Single or Day tickets				
Single	Adult	Off-peak	£1.70	Paper ticket
Single	Child	Off-peak	£1.10	Paper ticket
Single	Child	Peak	£1.60	Paper ticket
Bus Fare Cap Single	Any	Any time	£2.00	E-ticket
Return	Adult	Off-peak	£2.90	Paper ticket
Return	Adult	Peak	£4.20	Paper ticket
Return	Child	Off-peak	£1.50	Paper ticket
Return	Child	Peak	£2.10	Paper ticket
Canterbury DayRider	Adult	Any time	£5.40	E-ticket
Canterbury DayRider Under 19	Child	Any time	£3.90	E-ticket
Uni of Kent DayRider	Student	Any time	£4.10	E-ticket
Combo Day tickets				
Canterbury Flexi 5	Adult	Any time	£21.60	E-ticket
Canterbury Flexi 10	Adult	Any time	£37.80	E-ticket
Weekly tickets				
Canterbury 7 Day MegaRider	Adult	Any time	£18.50	E-ticket
Uni of Kent 7 Day MegaRider	Student	Anytime	£13.90	E-ticket
Longer-term tickets				
Canterbury 28 Day MegaRider	Adult	Any time	£68.10	E-ticket

Table 3.7: Bus fares for using Stagecoach to travel between Canterbury Bus Station and Whitstable

Ticket Type	User	Time	Price	Availability
Single or Day tickets				
Bus Fare Cap Single	Any	Any time	£2.00	E-ticket and paper ticket
Return	Adult, Student, Concession	Any time	£8.70	Paper ticket
Return	Child	Any time	£4.40	Paper ticket
South East DayRider	Adult	Any time	£8.70	E-ticket
South East DayRider Under 19	Child	Any time	£6.20	E-ticket
Combo Day tickets				
South East Flexi 5	Adult	Any time	£34.80	E-ticket
South East Flexi 10	Adult	Any time	£60.90	E-ticket
Weekly tickets				
South East 7 Day MegaRider	Adult	Any time	£30.60	E-ticket
Longer-term tickets				
Canterbury, Whitstable & Herne Bay 28 Day MegaRider	Adult	Any time	£85.80	E-ticket
South East 28 Day MegaRider	Adult	Any time	£110.70	E-ticket
Canterbury Christ Church UniRider (semester 1)	Student	Any time	£159.00	E-ticket
Canterbury Christ Church UniRider (2023-24)	Student	Any time	£214.00	E-ticket

PlusBus tickets

3.19 PlusBus tickets are purchased alongside National Rail tickets and permit unlimited bus travel on services of participating operators (Stagecoach, Regent Coaches and Chalkwell) while the ticket is valid. PlusBus tickets are not valid for the Canterbury Park and Ride service. PlusBus provides this offer for bus services in Canterbury and Sturry. Fares for a PlusBus ticket are presented below.

Table 3.8: PlusBus fares for the Canterbury area

Ticket type	User	Price
Day ticket	Adult	£4.50
Day ticket	Child	£2.25
Day ticket	Railcard holder	£2.95
7-days	Adult	£15.00
Month	Adult	£57.00
Quarter	Adult	£157.90
Annual	Adult	£599.90

Park and Ride

3.20 Park and Ride facilities in Canterbury are summarised below.

Table 3.9: Canterbury Park and Ride facilities

Site	Cost	Service frequency	Operating Hours	Note
New Dover Road 726 spaces	£4.00	Mon-Sat: 8mins Sun: 20mins	Mon-Sat: 7am to 7.10pm Sun: 9:45-5pm	5th journey in a calendar month free for those with ANPR parking account
Wincheap 590 spaces	£4.00	Mon-Sat: 8mins Sun: 20mins	Mon-Sat: 7am to 7.20pm Sun: 9:45-5.30pm	
Sturry Road 558 spaces	Re-open 1st April 2024			

3.21 Park and Ride usage peaked at 612,881 users in 2007 but usage levels declined over the period 2007 to 2019 where prior to the pandemic usage had fallen to 410,679. During the pandemic users fell to a low of 122,017. User volumes for 2022 increased to 205,199.

3.22 2023 total usage is unavailable, however park and ride payments by month between January 2023 and August 2023 show a continued trend for increased use.

3.23 Particular challenges relating to Park and Ride relate to changing working patterns following Covid, with an increase in working from home resulting in changed commute patterns as well as increases in online shopping. Also many of the city centre shops have converted to bars and restaurants which are not used in traditional peak hours, but may require the bus service and the P&R bus service to continue into the evening to support this night time economy. Canterbury's Park and Ride service is also sensitive to seasonal fluctuations, with demand highest in the autumn months.

3.24 Sturry Road closed in July 2022 due to low usage levels but it is planned the site will reopen in April 2024.

Congestion

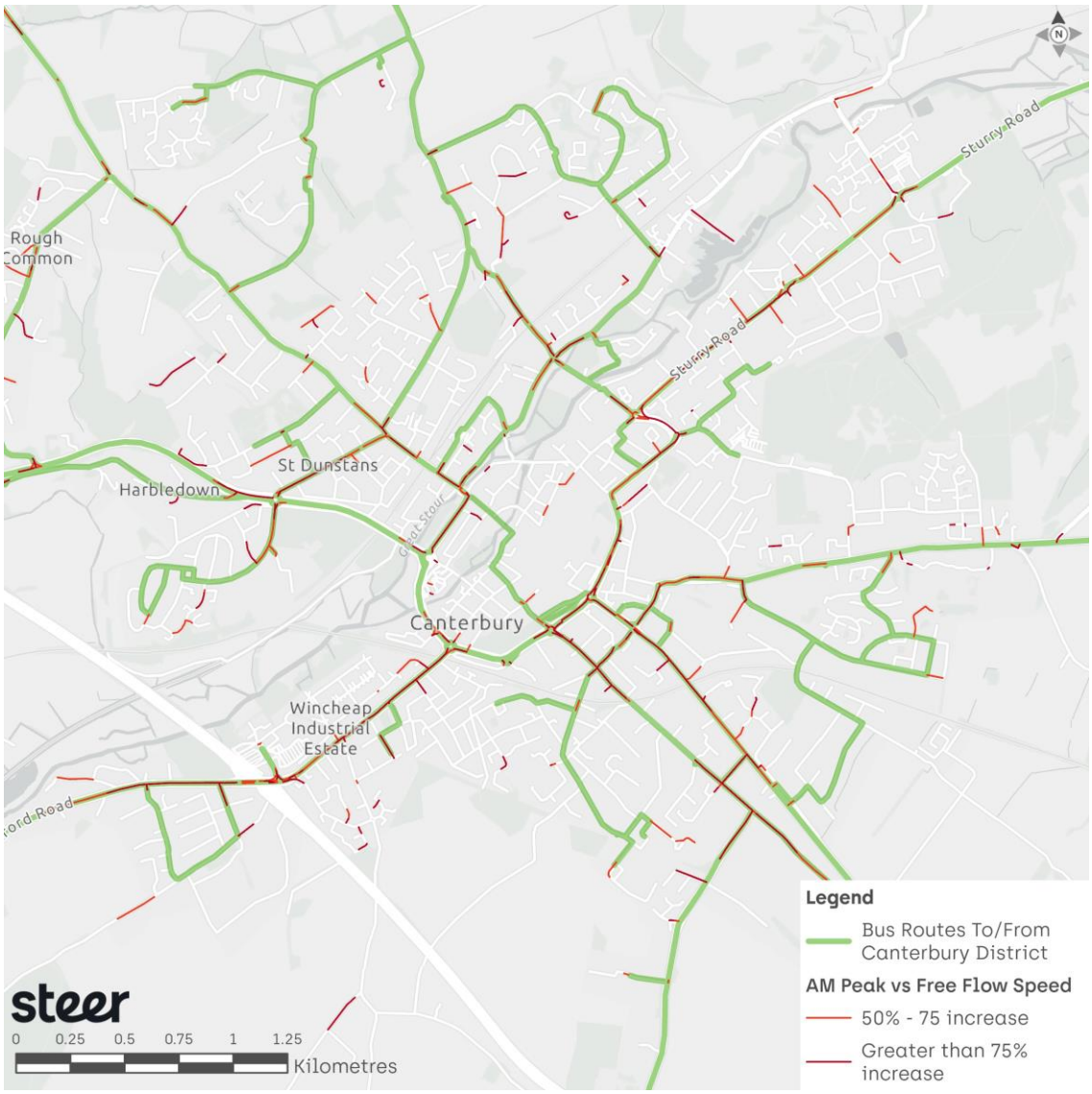
3.25 Canterbury city centre experiences congestion linked to high traffic levels, linked particularly with education (resulting in a relatively short morning peak but an afternoon peak that starts earlier) as well as the constrained road layout of the historic city centre.

3.26 Key congested routes into Canterbury city centre are:

- Sturry Road (A28);
- New Dover Road (A2050);
- St Dunstans St (A290) Old Dover Road;
- Wincheap; and
- St Stephens Road.

3.27 Other congested routes outside these radial connections include the ring road (Military Road, Upper Bridge St, Lower Bridge St, Pin Hill, Rhodaus Town, St Peters Place; Rheims Way); Wincheap; London Road; and A257/St Augustine's Roundabout.

Figure 3.18: Congestion hotspots – Canterbury city centre

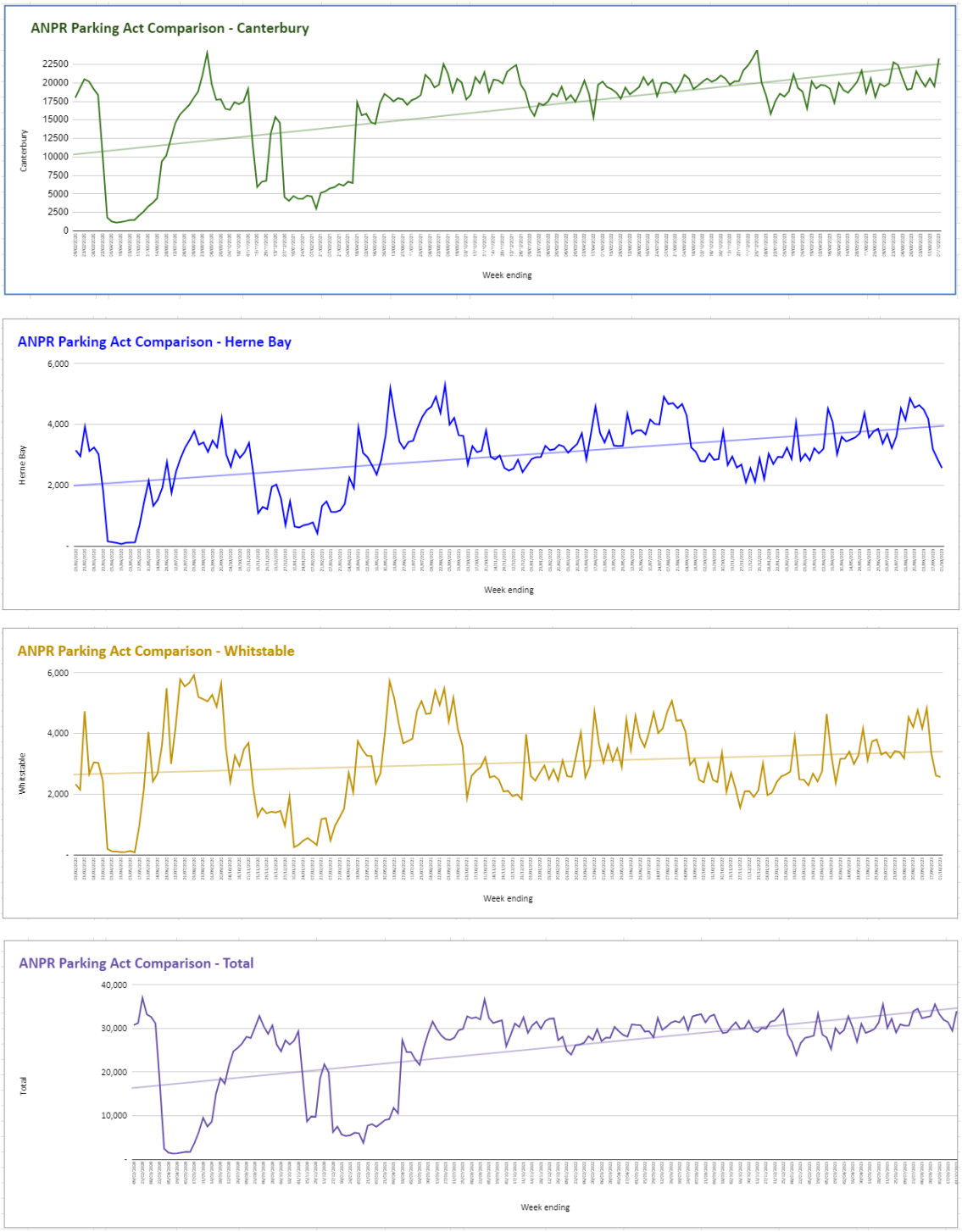


Parking

Usage

3.28 Usage, defined by the number of parking payments, across the district has shown a trend of overall increase between 2020 and 2023. On the 1st October 2023, 33,965 parking payments were recorded overall in the Canterbury District. The level of increase is greatest in Canterbury itself with growth in use happening at a lower rate in Herne Bay and Whitstable.

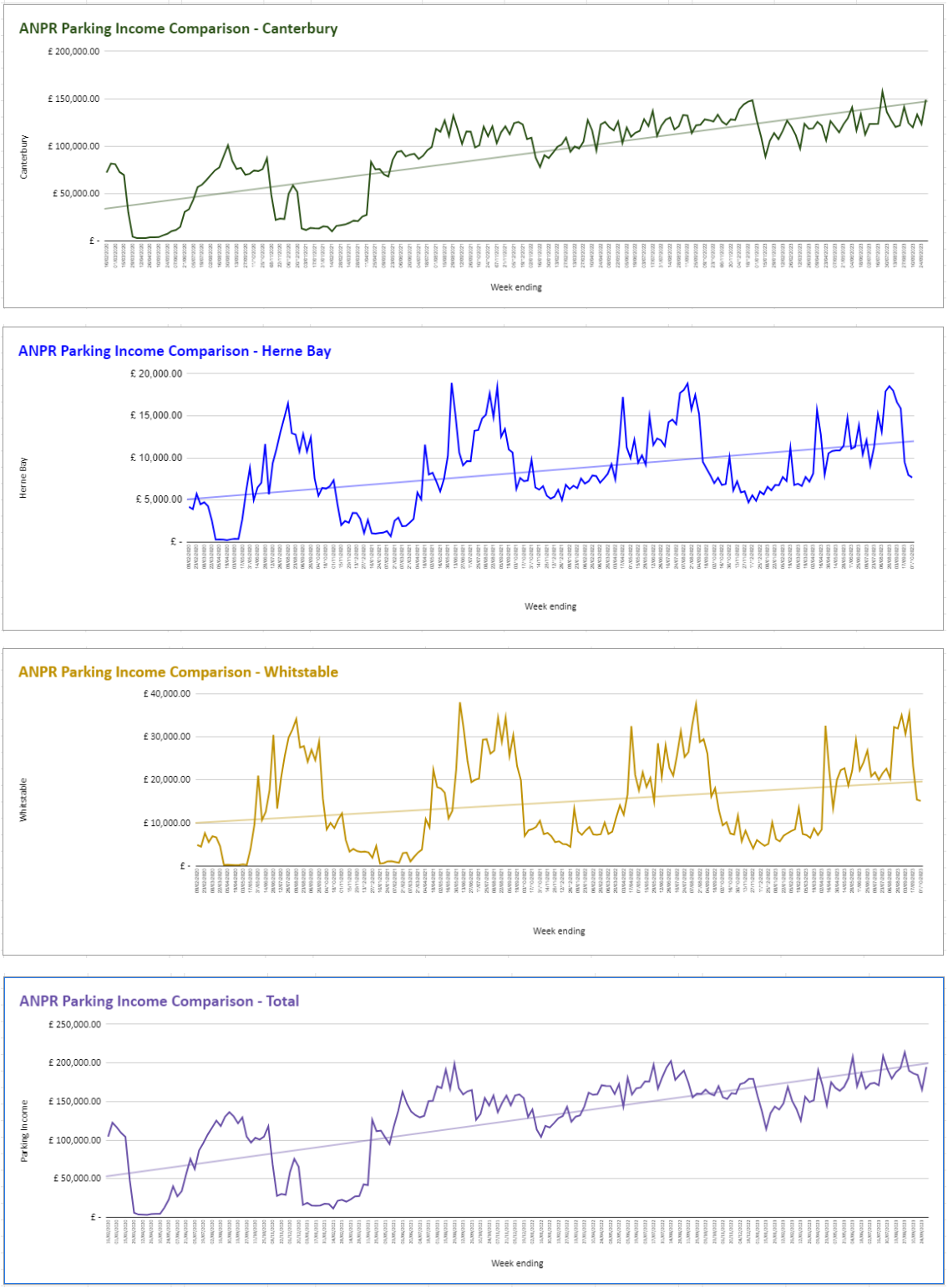
Figure 3.19: Parking payments (2020-2023)



Parking income

3.29 Considering parking income, the trend is also for an increase. Overall across Canterbury district income was £194,606 on the 1st October 2023. It can be seen that parking income in Herne Bay and Whitstable is highly seasonal in nature with peaks during the summer months.

Figure 3.20: Parking income (2020-2023)



Mode share

3.30 Changes in travel patterns and behaviour due to the Covid pandemic resulted in a large change in how, where and when people travel. Comparing travel to work mode share between 2011 and 2021 census data shows how mode share for travel to work changed in the Canterbury district with bus use dropping from 4.9% to 2.9% and a large increase in working from home, rising from 11.6% in 2011 to 30.4% in 2021. It should be noted that the 2021 census was conducted during travel restrictions due to the Covid pandemic thus do not provide a fully accurate picture of post covid travel patterns, however long-lasting impacts continue to be evident.

Table 3.10: Mode share (Census 2021)

Canterbury	Number	Mode share (2021)	Mode share (2011)
Driving a car or van	30,603	46.3%	55.0%
Passenger in a car or van	2,493	3.8%	4.7%
Train	1,537	2.3%	5.0%
Bus, minibus or coach	1,906	2.9%	4.9%
Bicycle	1,105	1.7%	2.7%
On foot	7,145	10.8%	14.7%
Work mainly at or from home	20,109	30.4%	11.6%
Other mode	1,267	1.9%	1.5%
All people aged 16 and over in employment	**66,165**	**100%**	

3.31 Given the changes in when and where people travel, travel to work mode share itself may no longer be as important as an indicator as it has been in the past, with more people being able to work from home, and choosing to travel for other non-work related purposes however more comprehensive, up to date trip data is not currently available.

Trip matrix

3.32 Pre-covid travel-to-work flows (all modes) were explored for those living in the Canterbury district to consider the level of cross-city flows. It can be seen that in 2011 the strongest flows (>750 people) between areas of the district were:

- Herne Bay to Whitstable, East Canterbury, South Canterbury and West Canterbury;
- Whitstable to Herne Bay; and
- North Canterbury to West Canterbury.

Table 3.11: Travel to work flows (2011)

	Herne Bay	Whitstable	East Canterbury	North Canterbury	South West Canterbury	South Canterbury	West Canterbury
Herne Bay	3,882	1,866	1,233	502	300	869	756
Whitstable	777	3,263	605	549	233	683	624
East Canterbury	69	42	866	172	159	414	537
North Canterbury	137	197	528	1,133	220	523	868
South West Canterbury	127	149	434	333	607	888	705
South Canterbury	97	152	454	338	230	1,303	714
West Canterbury	67	132	337	599	156	544	925

Summary of challenges & opportunities - Connectivity

	Opportunities	Challenges
	✓	⚠
Transport Network	Bus is the predominant form of public transport for local trips with limited competition from the local rail network. Improving integrating with rail for regional journeys presents an opportunity. A common interchange point at the bus station provides a known focal point for passengers.	The radial nature of the bus network, focussed around Canterbury bus station and need to interchange results in potential for increased journey times and capacity issues at the bus station.
Peak vs Off-peak services	64% of the population are within 400m of a high frequency weekday bus corridor (5+ buses per hour). 92% have access to a weekday peak service of at least 1 bus per hour.	Evening and Sunday services are much more limited with much of Canterbury's geography served by a service of between 1 and 2 buses an hour at these times.
Journey times & Reliability	Journey time and reliability benefits delivered via improved bus infrastructure, operations and customer experience alongside demand management measures for private car will improve the competitiveness of bus.	Journey time by bus are not competitive with the private car with equivalent bus journeys being ~6-10 minutes longer by bus.
Patronage	Core services in Canterbury have good patronage levels and are now returning to pre-covid levels.	Services outside the core network often show poor patronage making commercial operation more challenging, particularly for smaller settlements.
Infrastructure	There would be expected to be potential for journey time and reliability improvements on corridors in the district where bus priority infrastructure has not been developed to date.	Many of the 'quick wins' in terms of infrastructure have been delivered, meaning remaining improvements will be more challenging to deliver.
Ticketing	The current bus fare cap of £2.00 presents a short-term opportunity for promotion.	A complex range of ticket types may be off-putting to potential passengers.

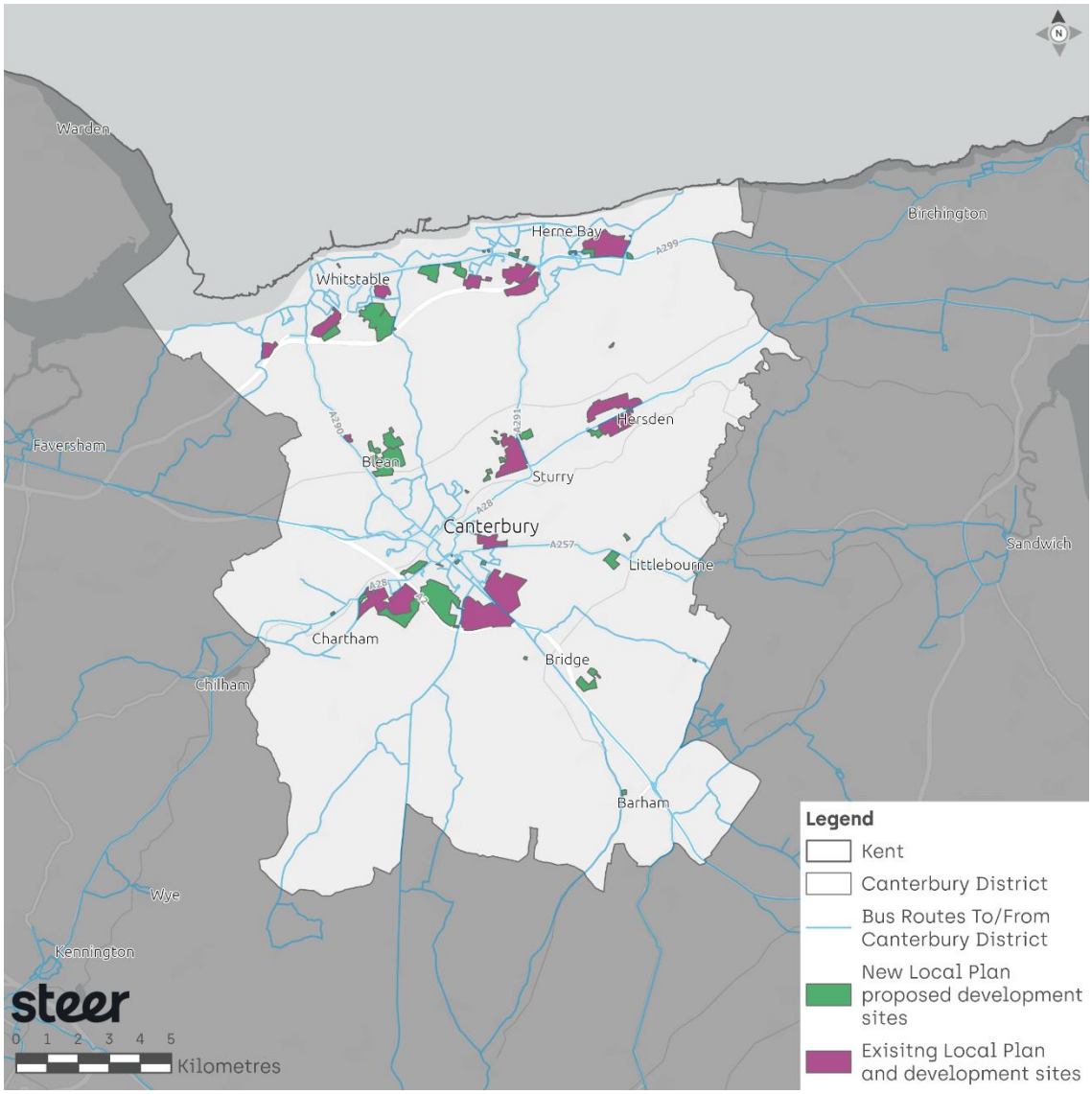
		Future cost increases in the future may deter bus users, especially those on the lowest incomes.
Park & Ride	Plans to re-open Sturry Road Park and Ride provide opportunity to re-capture this market and increase patronage. Recent trends for P&R show increased use. New Park and Ride sites and development of multi-modal hubs presents an opportunity for increased patronage and mode shift.	Park and ride patronage declined even prior to the pandemic. Setting realistic but ambitious targets for P&R use will be challenging. Ensuring P&R activity is captured in mode share targets and monitoring will be a challenge. Park and Ride use shows significant seasonal fluctuations.
Congestion	Potential exists for bus priority to allow bus to avoid congestion on key radial corridors, making journey times more competitive with private car.	Development of bus infrastructure may increase congestion if not implemented in conjunction with a coherent transport strategy that manages private car use.
Parking	Canterbury's city centre parking sites and associated charging policy present an opportunity to manage demand for car travel into the city centre through changes to parking costs.	Parking is a key income stream for Canterbury Council. Impact of reducing supply/demand for city centre parking will need to be considered.
Mode share	Lack of up to date, accurate travel to work mode share suggests this may be an opportunity to consider travel patterns in a more general sense which would better capture current trends in bus use (e.g. including non-work travel)	Current data on mode share (Census 2021) is heavily influenced by the pandemic and associated lockdowns, making a baseline mode share challenging to identify. New post-Covid travel patterns also present a challenge in terms of data collection and monitoring.

Future context

Proposed development sites

3.33 Local Development plans include proposed housing, employment and mixed-use sites on the periphery of key settlements within the district including Canterbury, Sturry, Whitstable, Herne Bay and Bridge.

Figure 3.21: Proposed development sites



3.34 It can be seen that proposed development is concentrated in the south west of Canterbury (around the A2), in Blean and on an east-west axis between Whitstable and Herne Bay.

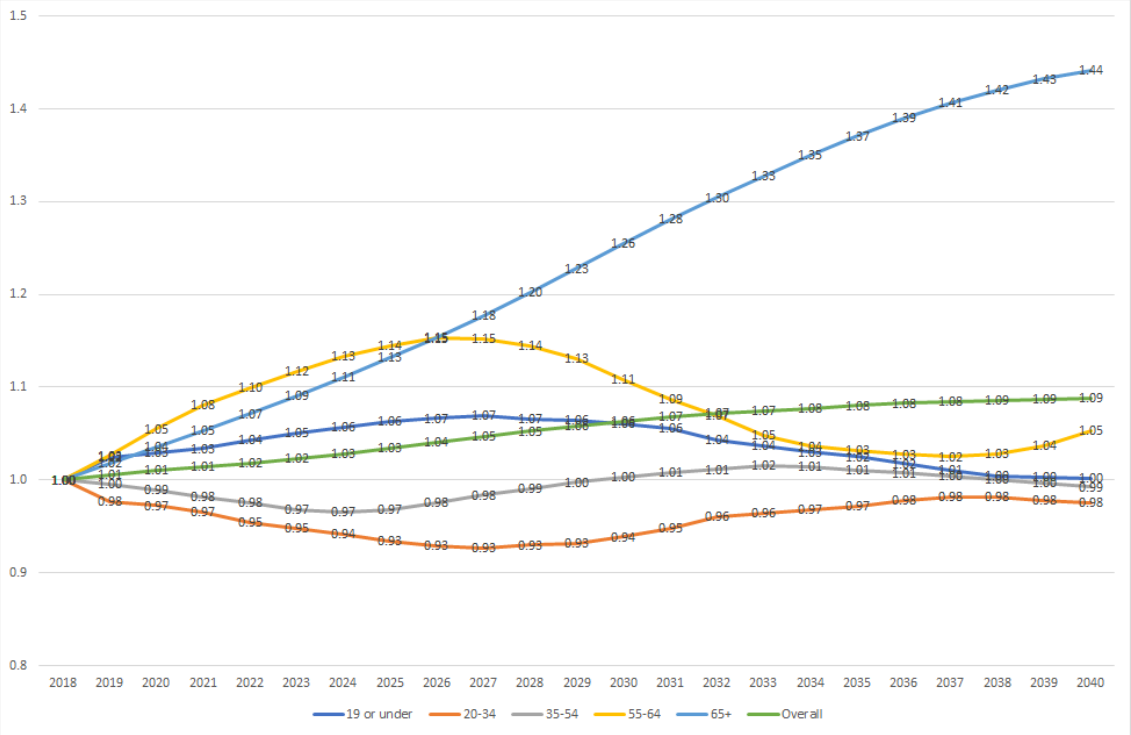
Projected population growth

3.35 The total population growth estimated by 2024 in Canterbury district is 59,821 (CCC local plan) from 2021 baseline of 157,400.

3.36 ONS data indicates population growth in the district will include an increasing proportion of older people. This presents a challenge in terms of providing concessionary services which meet the needs of this ageing population, a reduced pool of non-concessionary users and a

need for services and information that are better able to support those who may have limiting physical conditions.

Figure 3.22: Indexed projected population growth (2018-based subnational population projections, ONS)



Transport improvement schemes relevant to bus

3.37 A range of bus improvements are already proposed in the Canterbury District.

Canterbury
Proposed schemes
Wincheap: Proposed eastbound contraflow bus lane (between Hollow Lane and Simmonds Road)
New Dover Road (at St Lawrence Road): Bus priority measure associated with South Canterbury development (no detail)
Sturry Road: Proposed extension to existing bus lane between Starle Close and Tourtel Road; Proposed extension to bus lane Vauxhall Road to South Street
Nunnery Fields/South Canterbury Road/Newfastbus route from Mountfield Park to South Canterbury crossing B2068 and continuing to city centre on carriageway around Kent and Canterbury Hospital crossing B2068: Proposed fastbus on existing highway
Whitstable
Proposed schemes
St Andrews Close: bus gate onto Saddleton Road Whitstable Park and Bus: A2990 Thanet Way between Elgar Avenue and A290 junction

City Hopper Service

3.38 A city network service was considered in a previous bus strategy for the city in 2002, which included four routes, linking key sites. This included a circular route linking the University of Kent, Canterbury West Station, Canterbury East Station, Bus Station and Hales Place. A circular route also connected the bus station with the Spring Lane Estate, Barton Estate, Kent and

Canterbury Hospital. Two direct links also connected Hales Place and London Road with the Bus Station respectively.

Source: Canterbury Bus Study (2002)

Summary of challenges & opportunities – Future context

	Opportunities	Challenges
	✓	⚠
Proposed development sites	Proposed housing growth and large development sites present opportunities for new bus passengers. Many of these developments are located near existing high frequency corridors, presenting good opportunities to extend existing routes to serve development. New development presents funding opportunities for new bus infrastructure through S106 contributions or CIL	Challenges remain relating to matching service provision with rate of occupation. Limited Stagecoach depot and bus station space presents a challenge in accommodating additional new services.
Projected population growth	Projected population, particularly amongst an older demographic which are traditionally a core segment of the bus market indicates strong potential for increased patronage.	Older age groups have continued to have lingering concerns around Covid resulting in a slower rate of return to bus use.
Transport improvement schemes	A range of transport infrastructure schemes are already planned for Canterbury including proposed Fastbus which would serve developments to the south of Canterbury city centre.	Current proposed schemes are limited in scope. More significant bus infrastructure (in conjunction with operational and customer experience improvements) will be required to enable a step-change in patronage and mode shift to bus.

4 Potential impact

Introduction – the challenge of estimating impacts

4.1 Traditionally, target setting and monitoring in relation to local transport interventions had a great deal of reliance on travel to work data obtained via the national census. This dataset has a large number of benefits – a large dataset that can be analysed against a wide range of variables as well as over a period of time.

4.2 The 2021 census provides the most recent travel to work dataset, however this data was collected during a period of significant travel restrictions due to the Covid-19 pandemic, resulting in results significantly different both from pre-Covid levels and those expected to be prevalent at the time of this baseline report (November 2023). In addition to changes to travel patterns resulting directly from travel restrictions picked up in 2021 census results, the pandemic resulted in longer term impacts on travel behaviour in terms of increased levels of working from home, frequency of trip making and time and purpose of trip making.

4.3 These impacts mean identifying realistic impacts of Canterbury's bus strategy are more changing than they would be pre-pandemic. To consider impacts in a way that is proportionate to the strategy overall, the following has been considered:

- Review of potential impacts of physical, operational and customer experience;
- A focus on potential impacts of City Hopper and DRT services, in an attempt to understand any potential role for these in Canterbury; and
- Comparison of other UK cities with similar attributes to Canterbury to determine what 'good' could look like.

4.4 These inputs have been used to consider potential impacts of implementation of the strategy.

Understanding potential impact

Physical interventions

4.5 Interventions defined by physical infrastructure improvements are shown to decrease journey times and improve reliability of bus services. Implementing continuous bus lane corridors or targeted bus lane interventions at pinch points can improve bus journey times by 20-23% (DfT, 2004), while knock-on impacts to private vehicle journey times are likely to be only marginally affected. Bus service reliability can likewise improve by 12-18% (DfT, 2004). Research by Ben-Dor et al. (2018) shows that implementation of dedicated bus lanes can improve bus patronage by up to 20%. Bus pre-signals can improve journeys times by 6% (ITPS, 2015) while removing or rationalising signals could improve journey times by 2-8% and improve reliability by 13-35% depending on context (Jepson & Ferreira, 1999).

Operational interventions

4.6 Considering operational changes, research shows that streamlining ticketing can lead to notable improvements. Introducing 'tap on - tap off' systems has been shown to increase

patronage by up to 20%, improve journey times by 10% and lead to revenue increases of up to 12.6% (PTEG, 2009). Off boarding the ticketing process has been shown to reduce average passenger dwell times by up to 42% (NACTO, 2017). It is suggested that cheaper fares are likely to result in additional trip generation (DfT, 2004).

'Soft' interventions

4.7 Data from the DfT (2009) showed that implementing a range of 'soft' measures such as improvements to branding and passenger comfort can lead to patronage improvements. The Goldline 66 in Warwick saw overall patronage rise 35.2% after four years, while rebranding in Warrington alongside the opening of a new bus interchange saw patronage increase 14.3% after two years.

Table 4.1: Case studies considering impacts of bus strategy elements

Case Study	Information	Quantified Impact on mode share and/or patronage
Brighton & Hove Council	✓ The Council has supported operators in improving service frequencies, creating value for money fare structures and investing in new buses and customer training. ✓ The Council was allocated £27.9 million by the government as part of its Bus Service Improvement Plan in 2022.	✓ Effective partnership working between Brighton and Hove Council and local bus operators has yielded high bus use numbers in the area, with 167 journeys made per person between 2019-2020 (DfT, 2020).
West Sussex Fastway	✓ Scheme delivered between 2003 and 2006 at a cost of £38 million, involved the construction of a new bus-only link as well widening existing roads with dedicated bus lanes. ✓ Overall customer satisfaction has increased up from 91% in 2004 to 96% in 2008.	✓ Patronage has increased 160% over the first ten years of use. ✓ Average journey times reduced by 9.5 minutes, including waiting times.
Harrogate Bus Company	✓ Premium bus route offering with improved passenger experience on Route 36 between Ripon, Harrogate and Leeds. ✓ Higher service frequency, on board Wi-Fi, USB sockets, and brighter environment. ✓ Survey data has shown that more than 50% of bus passengers on 36 who own a car choose to ride this bus service instead.	✓ Number of passengers using the 36-bus route has almost doubled over a 15-year period.

Benchmark cities

A review was undertaken considering bus more share for historic cities elsewhere in England prior to Covid to consider how Canterbury (both as a city and a district) compared with other potentially similar locations. In 2011, Oxford's built up area had a notably higher bus mode share than other historic cities (16%), which though partly due to high student population may also be attributed to long term policy backdrops that support bus and park and ride use. In this regard, the value of 16% has informed (alongside other variables) aspirational target setting for bus mode share for urban areas in the Canterbury district.

Table 4.2: Travel to work mode share (2011 census) – Built up area

Method of Travel to Work	York BUA	Bath BUA	Lancaster/ Morecambe BUA	Cambridge BUA	Colchester BUA	Canterbury BUA	Oxford BUA
Work mainly at or from home	5%	8%	4%	7%	4%	5%	6%
Underground, metro, light rail, tram	0%	0%	0%	0%	0%	0%	0%
Train	3%	5%	2%	4%	8%	5%	2%
Bus, minibus or coach	**7%**	**8%**	**7%**	**7%**	**7%**	**6%**	**16%**
Taxi	0%	0%	1%	0%	0%	0%	0%
Motorcycle, scooter or moped	1%	1%	1%	1%	1%	1%	1%
Driving a car or van	44%	43%	55%	37%	55%	42%	37%
Passenger in a car or van	5%	4%	7%	3%	5%	5%	3%
Bicycle	13%	4%	5%	27%	5%	4%	16%
On foot	22%	25%	18%	13%	15%	31%	17%
Other method of travel to work	1%	1%	1%	1%	1%	1%	1%
All categories: Method of travel to work	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

5 Case studies

Introduction

5.1 Two intervention types are explored in more detail within this baseline report – City Hopper services, of which were of interest to Canterbury City Council to improve cross city access, and Demand Responsive Services, as a possible way to enhance accessibility outside the traditional bus network.

City Hopper services

5.2 City hopper routes tend to run short routes around a city centre or connect points of interest on the edge of town, such as park and ride, hospitals and universities with local railway stations. They often operate at a high frequency. Operating hours are often limited, often running between 9am and 5pm though examples exist where this is extended operating hours from 7am to 7pm. City hopper services are often free of charge or have a low flat fare of £1 or £2.

Demand responsive services

5.3 In successful applications, Demand Responsive Transport (DRT) schemes can reduce journey times by offering a more frequent service than a fixed route bus in less densely populated areas, as well as offering more point-to-point services. Journey time can increase mid journey for additional pick-ups and drop offs which were booked once a passenger already has boarded a bus, which makes it less dependable when travelling to an appointment or trying to catch a train service. DRT schemes also depend on the number of vehicles and drivers available. When all drivers and vehicles are fully booked, you can't use the service. DRT schemes can offer a higher frequency by being flexible in when they are available to use, rather than fixed to a timetable. Fares are usually kept artificially low to make it attractive to use, but this often leads to the requirement of significant funding to keep the services going. This makes the service unsustainable and vulnerable to spending cuts. A similar or slightly higher fare makes the service more sustainable as it reduces the funding required to keep it running and can unlock investments in the long run.

Table 5.1: City Hopper service case studies

Case Study	Information	Quantified Impact on mode share and/or patronage
Hop! (Leicester)	✓ Free service connecting key city centre sites including rail station, bus station, universities and hospital ✓ The Hop service route is a loop around the city centre of Leicester ✓ It runs a frequency of 6 buses per hour between 8am and 6pm ✓ It uses new electric minibuses (21 seats and wheelchair space). ✓ The scheme is on trial for 18 months and funded by Leicester City Council with £325,000 for service operation and marketing, with the buses funded out of the DfT's Transforming Cities fund (£1 million)	✓ Over 100,000 passengers within 5 months of operation/~1000 passengers per day ✓ As the scheme has been introduced quite recently, no data is yet available on mode share impacts
Free Town Bus (Huddersfield)	✓ The Huddersfield Free Town bus has operated since 2006 and is free of charge ✓ The service runs once every 20 minutes and runs a loop around the city centre connecting Huddersfield Train Station, Bus Station and key city centre locations including the University ✓ Runs from 09:30 to 15:05The service is operated by just 1 bus (A diesel minibus)	✓ The route carries 29,000 passengers per month (2012) ✓ In 2016 it was estimated it would cost £888,000 to operate for 5 years, making the cost £177,600 per annum.

Table 5.2: Demand responsive service case studies

Case Study	Information	Quantified impact on mode share and/or patronage
GO2 Share (Sevenoaks)	✓ The scheme has been introduced in 2020 and is funded through fares and funding from Kent County Council ✓ GO2 got £350,000 subsidy from Kent County Council ✓ The DRT operated by the same company that operates the bus services in the area ✓ The Service makes use of standard minivans with a maximum capacity of 6 people, enabling holders of a standard Drivers' licence to operate the buses. ✓ The service provision is integrated in an app together with the local timetabled bus services, making access to the DRT easy.	✓ According to early data from the app software supplier, bus utilisation increased by 77%, Driver hours' were reduced by 62% and the average time went down from 49 minutes to 11 minutes.
FlexiBus (East Leeds)	✓ Introduced in 2021 in East Leeds for a 3-year trial period ✓ The service is separate from the standard bus operation and requires a special app to access ✓ There is a flat fare of £2 ✓ The service uses specially ordered electric minibuses	✓ The service is being used by 242 passengers per week making 627 journeys. ✓ The buses have a limited range(100 miles), forcing them to go back to the depot to be charged up on a regular basis. ✓ The service costs over £16 per passenger to operate, with an increase to £40 expected due to inflation ✓ 59% of passengers had previously walked or used public transport and 9% had previously used a car. ✓ As the cost is set to increase significantly and not many people are using the service, it has been terminated permanently as of July 2023

6 Stakeholder engagement

Introduction

6.1 A programme of stakeholder engagement was undertaken during the development of the strategy including Partner workshops, a councillor briefing and engagement with DfT and National Highways.

Partner workshops

- **Workshop 1:** Introduced the process by which the bus strategy would be developed, consideration of key challenges and opportunities, vision and objectives and explore customer experience long-listing;
- **Workshop 2:** Operations and Infrastructure long listing;
- **Workshop 3:** Overview of long list assessment and consideration of delivery and feasibility aspects of the shortlisted strategy elements;
- **Workshop 4:** Reporting back on the strategy content with final opportunity for feedback from partners.

6.2 Representatives from Canterbury City Council, Kent County Council and Stagecoach were present. Regent coaches were kept informed of workshop outputs with opportunity to comment as desired.

Councillor Briefing

6.3 A **councillor briefing** was also undertaken at which the draft strategy was presented. Opportunity for comment was provided.

DfT & National Highways

6.4 Informal discussions were undertaken with DfT and National Highways during the strategy development process. DfT indicated interest in seeing the outcomes of the study. National Highways indicated potential to support corridor-based interventions relating to bus shelter infrastructure.

Workshop outputs

6.5 This section highlights the key takeaways from the initial workshops:

Key Challenges and opportunities

6.6 Several challenges were highlighted by the representatives throughout the two workshops, including the poor frequency of late evening bus services (post 7pm). With the evening economy developing in Canterbury, later evening bus services were seen as a missed opportunity to increase patronage.

6.7 A common theme throughout the workshops was the lack of predictability and reliability of the current bus services, causing public perception of services to be poor. The unpredictability of bus services was seen as a particular challenge in Canterbury city centre, where congestion

is often worse and frequent throughout the day outside of peak hours. The lack of reliability in bus services led to there being a desire from all parties to segregate bus from general traffic whenever possible, as well as to disincentivise car usage especially in urban centres to allow bus priority.

6.8 A further challenge relates to potential impacts of changing the current fare cap and how removal of this may change demand and commerciality of some bus services in the district. However, the current fare cap was also noted to be a key opportunity to increase the advertisement of the low bus fares to non-users to potentially raise patronage.

Customer experience

6.9 Several improvements and options were suggested on how to improve customer journeys both on and off the bus. Increased provision of tap on/ tap off ticketing across all operators requires upgrading to allow improved ticketing products. Accessibility at bus stops may reduce some user's ability to travel by bus, therefore improving accessibility at bus stops and the access routes to these especially in rural areas could be a potential opportunity.

6.10 Area guides, tailored to specific locations may increase awareness of bus services in a customer's local area for both bus users and non-users. Alongside this, smart phones and social media allow real-time customer engagement and information to be released in a timelier manner and should be utilised more regularly. An additional improvement to increase awareness of local bus services was to introduce interactive screens in new developments that could show bus information.

6.11 Personal safety both on and off the bus was highlighted as an area which could be improved. Options for improving safety on the bus included reintroducing bus conductors. At bus stops, the success of the Levelling Up Fund proposal was seen as vital to improve the unpleasant environment around Canterbury Bus Station but further improvements may be possible.

Operations

6.12 A number of key operational service improvements were identified in the Canterbury district including:

- Introduction of a 'hopper bus' – A concept involving around 4-5 buses targeting Canterbury residents, which would be a free or low-cost service linking key locations in Canterbury. However, a potential drawback of this service was the high operational cost of minibuses, and it may reduce patronage on other commercial services.
- Disincentivising car usage may help reduce general traffic levels in the city centre with the aim to increase bus journey times. However, many methods such as parking and loading restrictions and car free zones are only as good as the enforcement behind them.
- Removal of the need for each route to terminate at the bus station and creating through routes would reduce the need for overlapping solutions. This would need a greatly enhanced information strategy as the bus station is a key hub in the city.
- New Bus Routes – Stagecoach alongside the university is currently investigating a potential 24-hour bus service.
- Rural Communities – Bus is seen as a vital service for rural communities, but the lack of commerciality of these services provide challenges. Innovative solutions are required to maximise the use of current resources available to help minimise costs. Examples include the use of the Kent Karrier, or to use school buses outside of school hours.

- Park and Ride remains a key priority for Canterbury with an additional P&R site at Wincheap still planned. More innovative solutions may also be required, such as using P&R sites differently to serve local communities as part of a through route.

Infrastructure

6.13 An audit of walking routes and a potential wayfinding strategy were infrastructure solutions to help better equip both tourists and local residents with local knowledge of bus routes and walking routes. A new wayfinding strategy was seen as a potential way to not only increase active travel in the district, but also improve accessibility and information about bus services. Outside of the bus station, bus service information was often perceived to be inadequate.

6.14 Currently, Canterbury Bus Station is operating at full capacity and therefore it is difficult to introduce new routes into the station. Opportunities such as creating through routing bays were suggested to increase capacity. However, any infrastructure changes to the bus station would need to be considered carefully due to potential constraints imposed by English Heritage.

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