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REVIEW

2020

6TH FEBRUARY 2020

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UK BUS SUMMIT

THE NEED FOR A NATIONAL BUS STRATEGY WHAT CAN OUR BUSES DO FOR OUR COUNTRY?

The 6th annual UK Bus Summit will take place in London on 6th February 2020.

The UK Bus Summit is the premier bus event covering all parts of the UK. Held right at the heart of Westminster to elevate the importance of bus at the centre of local and national decision making, the event allows the opportunity to compare and contrast bus policy throughout England, Scotland, Wales and Northern Ireland.

Key decision makers in government from around the UK will lead off the day, alongside the voice of the bus and coach industry CPT, to put forward the investment case for the bus, highlighting why the country desperately needs a bus strategy. Other themes that will take a focus include:

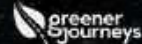
- Buses, business and retail
- The role of the bus in achieving clean growth and net zero
- How to make the most of the Bus Services Act

We are looking forward to welcoming delegates from across the industry, including manufacturers, suppliers, operators, LEPS, local authorities, and government, among others.

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WELCOME

Welcome to the *UK Bus Summit Review 2020*, a publication devoted to the UK's main mode of public transport. This publication has been produced by *Passenger Transport*, in association with *Transport Times Events*, to coincide with the sixth annual *UK Bus Summit*. This event will be held in London at the QEII Conference Centre, Westminster, on February 6 and is supported by the CPT, Department for Transport, Greener Journeys, LowCVP and Transport for London.

The *UK Bus Summit Review 2020* puts the spotlight on local bus services in the UK, and the operators, authorities, suppliers and other stakeholders involved in planning and providing them. It celebrates the sector's achievements and considers the challenges. The focus of this year's Summit will be the investment case for buses and the need for a national bus strategy, the role of bus in achieving green growth, the interface with business and retail, and making the most of the Bus Services Act.

We hope you find it an interesting read and we welcome all feedback.

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At First Bus we're making travelling with us better for our customers by:

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2020 - A TRANSFORMATIONAL YEAR

I am delighted to have been asked to write this year's foreword to the *UK Bus Summit Review*, especially as 2020 will be such a transformational year for the bus network.

As summit attendees, you will be well aware of the vital role that buses play in connecting our communities to the workplace and to vital public services such as healthcare and education. Buses support our economy, help tackle congestion and make an important contribution to reducing emissions in cities.

Last year, there were 4 billion bus journeys in England and of the 33,900 vehicles used, 74% offered contactless payment, up 10% from last year. This shows how important buses continue to be and how investment by bus operators is ensuring they evolve and reinvent themselves to fit

customer needs.

However, I want to go even further to boost bus services, to make sure they are easy to use, convenient and reliable. That is why last September the Government announced a £220m funding package, alongside committing to the UK's first-ever bus strategy and long-term funding settlement.

The strategy will be vital in re-setting and strengthening our relationship with the bus industry. It provides an opportunity for us to be clear about what we expect of local authorities and bus operators and what we will deliver in return. I hope we can work together to create a shared vision of what we can achieve for passengers.

The new funding will also open up a range of opportunities for England's main mode of public transport, and includes £20m for bus priority measures in the West Midlands, an additional £30m

for all local authorities to support vulnerable services, and £20m to support demand-responsive services. This will revitalise the bus industry, with impacts across the country.

The funding will also help usher in a green revolution in bus travel, through our £50m fund to deliver Britain's first all-electric bus town or city. By turning an entire bus fleet to zero emissions, we can tackle air quality and carbon emissions; bring down industry operating costs; and support the UK bus manufacturing sector.

This year we will also see major progress on bus open data, with the launch of a new digital service to enable bus operators and local authorities to share information on routes and timetables, fares and tickets and real time information. We will be putting legal obligations on bus operators and local authorities to support this, so

that passengers can be confident that wherever they go, they will have the information they need to make bus journeys.

All this creates fantastic opportunities to grow patronage, tackle congestion and improve the local environment. 2020 will prove to be an exciting year for buses and I look forward to working together to deliver a bus revolution that will keep Britain moving ahead. ■



**Baroness Vere,
Minister with Responsibility for
Buses, Department for Transport**



The new funding will open up a range of opportunities for England's main mode of public transport, and includes the £20m for bus priority measures in the West Midlands

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IAN WARR, ENGINEERING DIRECTOR, FIRST UK BUS

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Claire Haigh of Greener Journeys told the *UK Bus Summit* that a long-term investment strategy was needed to reverse continued declines in bus patronage

A BREAKTHROUGH YEAR FOR BUSES?

FEBRUARY

STRATEGY SUMMIT HEARS CASE FOR NATIONAL BUS STRATEGY

Several speakers at the *UK Bus Summit* in London in February advocated that the Government should work towards the creation of a national bus strategy to kickstart growth in the industry.

In a robust speech, Claire Haigh, the Chief Executive of sustainable transport campaign group Greener Journeys, said

a long-term bus and coach investment strategy was needed if continued declines in bus patronage are to be reversed.

She argued that while existing bus revenue funding streams like BSOG needed to be protected, a step change in funding for local transport was also required, including additional funds to improve local bus infrastructure.

"Bus is the only form of transport not to have a long-term investment strategy," Haigh pointed out. "We invite Government to work with us to develop a strategy that will maximise the role that

buses can play supporting jobs, growth and productivity. A strategy that will help create a fairer and more inclusive society, better able to tackle the biggest challenges of our times."

AIR QUALITY GM CLEAN AIR PROPOSALS ARE 'BUS PASSENGER TAX'

Proposals to tackle the problem of air pollution in Greater Manchester, including a £100 daily penalty for diesel buses that don't comply with Euro 6 emissions

standards, were endorsed by the region's combined authority in February.

It has been estimated that polluted air contributes to the equivalent of 1,200 early deaths a year in Greater Manchester alone. Greater Manchester Combined Authority proposed a Clean Air Zone requiring owners of "high polluting" buses, HGVs, vans and private hire vehicles - but not cars - to pay a daily penalty to drive into the conurbation.

From 2021, it is proposed that buses and HGVs that fail to meet Euro 6 standards will pay a £100 a



day penalty. Non compliant taxis and private hire vehicles will pay £7.50 a day from the same date, and non-compliant vans will pay £7.50 a day from 2023.

Commenting on the decision to exclude cars, Transport for Greater Manchester said “the inclusion of cars would also impact on more deprived communities, for whom the cost of upgrading to a newer, cleaner vehicle isn’t a viable option”.

Onebus, which represents private bus operators in Greater Manchester, labelled the £100 a day levy a “bus passenger tax”.

DRT TFL ANNOUNCES PLANS FOR SUTTON DRT TRIAL

Transport for London announced plans to launch a year-long trial of a demand-responsive minibus network in Sutton, south London from May.

TfL launched a four-week consultation into the plans in February and said the new service would let people or groups use an app to book seats on a minibus that would stop at more convenient locations, including areas not currently served by



In February, Transport for London announced plans to trial of a DRT minibus network



The UK's first full-sized autonomous bus began a trial in a Manchester bus depot in March, in a partnership between Alexander Dennis, Stagecoach and Fusion Processing



First Bus completed the sale of its 163-vehicle Queens Road depot in Manchester to Go-Ahead Group in June, creating Go North West

public transport.

The on-demand service was proposed to run from 6.30am to 9.30pm, seven days a week and use eight fully accessible 14-seat Mercedes-Benz Cityline Sprinter low floor minibuses. Each is equipped with free Wi-Fi and USB charging points.

MARCH

AUTOMATED VEHICLES STAGECOACH TRIALS UK'S FIRST AUTONOMOUS BUS

The UK's first full-sized autonomous bus began a trial in a Manchester bus depot in March. The ground-breaking project, involving a single Alexander Dennis (ADL) Enviro200 vehicle, is part of a programme being delivered by transport operator Stagecoach in partnership with ADL and technology company Fusion Processing.

The bus is now able to operate autonomously within Stagecoach Manchester's Sharston depot using Fusion Processing's CAVstar autonomous vehicle system. This system was previously successfully used in the Greenwich autonomous vehicle trials in 2018 as well as a number of other similar projects. The trials have reached the point where the bus can now move around the depot environment autonomously, carrying out simulated movements such as parking and moving into the bus wash.

This hardware and software also forms the basis for a more significant autonomous vehicle trial due to get underway in 2020. That will see five buses operating in autonomous mode in public service between Fife and Edinburgh, across the Forth Road Bridge Corridor as part of the CAVForth project.

PASSENGERS ALMOST NINE IN TEN BUS PASSENGERS SATISFIED

Almost nine in 10 passengers using buses were satisfied with their last journey according to the

annual survey by Transport Focus, published in March. Around 50,000 passengers took part in the Autumn 2018 Bus Passenger Survey. In England 88% of them were satisfied with their last bus journey, 91% in Scotland.

Commenting on the survey results, David Sidebottom, Director at Transport Focus, said: "Nearly half of passengers surveyed in England say the bus is the only real means of transport available to them, so it's vital that their service is on time, reliable and offers good value for money."

"Bus companies like Trentbarton show what can be done when bus operators and transport authorities use the Bus Passenger Survey results to identify improvements for their passengers."

"It is good to see improvement in overall satisfaction ratings for younger bus passengers. This builds on recent campaigning by Transport Focus to make the bus a better deal for young passengers."

"There are also huge variations in satisfaction with value for money ratings ... so there is still room for improvement. More operators and authorities must work together to attract new passengers and ensure the bus continues to provide an essential lifeline to communities."

MAY

MANUFACTURERS

£320M SALE OF ADL WILL 'BOOST GLOBAL GROWTH'

The UK's largest bus builder, Alexander Dennis Limited, claimed in May that its sale to Canada-based NFI Group Inc. would "create a platform for international growth, accelerated technology development and innovation". ADL was acquired by North America's largest and most diversified bus and coach manufacturer in a £320m deal.

ADL retained its own brand, and Chief Executive Colin Robertson, who led the growth and internationalisation of the Falkirk-based company for more than a decade, stayed on.



The green transport choice: Catch the Bus Week 2019 was launched at Go-Ahead London's 100% electric Waterloo garage in July



The sale of Alexander Dennis Limited to NFI Group Inc. was announced in May

Robertson was also tasked with driving NFI's global growth ambitions.

"We are incredibly proud of the growth and success we've had building Alexander Dennis over the past 15 years, and I'm excited to have the ADL team join NFI - one great bus company joining another," Robertson said.

"We believe our consolidated businesses will enhance NFI's market leading position in North America, while improving NFI's offering through combined engineering expertise, supplier partnerships, electric vehicle know-how and aftermarket platforms. I look forward to

continuing our solid progress at ADL and also championing further international growth."

JUNE

AQUISITIONS

FIRST SELLS MANCHESTER BUS BUSINESSES

First Bus completed the £11.7m sale of its 163-vehicle Queens Road depot in north Manchester to Go-Ahead Group in June.

The £11.2m deal took Go-Ahead into Greater Manchester, Britain's second-largest urban area, for the first

time. The 163-vehicle operation was renamed Go North West.

First Bus later announced its intention to sell the Bolton bus depot and operations to Rotala in June. The sale included the Bolton depot site, with 18 commercial bus services and 500 employees transferring across to Rotala.

Following a review of its Manchester operations completed in 2018, First Bus said it took the decision to reduce exposure in Greater Manchester "due to the current uncertainties in that particular market".

JULY

CAMPAIGNS

'CATCH THE BUS WEEK' LAUNCHED AT ELECTRIC DEPOT

Highlighting the environmental credentials of bus travel, Catch the Bus Week 2019 was launched at Go-Ahead London's 100% electric Waterloo garage in July.

Now in its fifth consecutive year, the week-long campaign which began on July 1 saw events, ticket giveaways and other activities taking place across the country, with bus companies, local authorities and passenger groups involved.





Scotland's First Minister Nicola Sturgeon was joined by bus company managers and staff at the launch of the 2019/20 Programme for Government in September

AUGUST

POLICY

PRIME MINISTER - I WILL TRANSFORM BUSES

Prime Minister Boris Johnson declared local bus services to be among his government's domestic priorities in a speech in Manchester in August.

Johnson told an audience at the city's Science and Industry Museum that he wanted to improve transport services within cities - not just between cities - so that "people don't have to drive".

"That means buses," he said. "I know a lot about buses, believe me. I love buses ... I will begin as a matter of urgency the transformation of local bus services - starting here today in Manchester."

The former Mayor of London said he would work with the current Mayor of Greater Manchester, Andy Burnham, on his plans to deliver "a London style bus system" using the 2017 Bus Services Act.

"I want local partnerships between the private sector, which

operates the buses, and a public body, which coordinates them," he said.

Johnson pointed out that bus use in the capital "where we have all these things" had almost doubled over the past 25 years while it had fallen by more than a third in other metropolitan areas over the same period.

"I think we can see the first results, here in Greater Manchester, within a few months," he said. "And I want the same for any other part of the country where local leaders want to do it."

He added: "Good bus connections, good transport connectivity, is also vital to so many of the towns that feel left behind."

SEPTEMBER

FUNDING

SCOTLAND TO SPEND £500M ON BUS PRIORITY

The Scottish Government announced a "landmark investment" of £500m in September, to improve bus infrastructure across the country

to encourage more people to use public transport.

The investment was part of the 2019/20 Programme for Government, which set out the Scottish Government's next steps to tackle climate change, following First Minister Nicola Sturgeon's acknowledgement of a global climate emergency earlier in 2019.

The Programme for Government pledged to "bring forward a step change in investment to make bus services greener and more punctual and reliable, so that more people make the choice to take the bus".

In addition to the £500m investment in bus priority infrastructure, actions included "beginning plans to reallocate road space on parts of the motorway network around Glasgow to high occupancy vehicles such as buses".

The Scottish Government also proposed to work with the Scottish National Investment Bank, the bus sector and potential investors to explore options for new forms of financing "to radically accelerate the deployment of zero emission buses across Scotland".

FUNDING

JAVID COMMITS £200M FOR BUSES

Chancellor Sajid Javid announced extra funding and support for the transport sector in his spending round announcement in September.

It saw an 11.4% increase in real terms to the Department for Transport's resource budget from 2019/20 to 2020/21. £200m was allocated for buses in England to fund initiatives to introduce more low carbon buses and also for pilots of demand responsive transport technology.

The Confederation of Passenger Transport said the funding announcement was welcome news for bus passengers.

"Bus operators have been investing hundreds of millions in creating the most environmentally friendly fleet the UK has ever had and this funding will allow for further investment to reduce carbon dioxide emissions and improve air quality," said CPT Chief Executive Graham Vidler.

"We look forward to engaging on further trials for on-demand services, many of which are

already taking place. These services have the potential to be part of the solution to provide innovative and sustainable transport models in less well connected areas.”

However, Vidler warned that the issue of congestion and unpredictable journey times needed to be addressed as a priority. “This requires a greater focus on putting bus first in local transport networks,” he added.

POLICY **BOLD NEW VISION** **FOR A BILLION MORE** **BUS USERS**

Bus operators unveiled a bold new strategy in September, to improve services in England, help tackle climate change and get a billion more passenger journeys by bus by 2030. It contained a range of new commitments as well as desired actions from government.

“We can do even more to tackle climate change and improve air quality by getting people out of their cars and onto the bus,” said CPT Chief Executive Graham Vidler. “If everyone switched just one car journey a month to bus, there would be a billion fewer car journeys and a saving of two million tonnes of CO₂ a year.”

CPT offered to:

- Re-invest savings made through local planning and infrastructure measures.
- Expand discounted ticketing to apprentices and job seekers.
- Develop and trial innovative rural bus plans.
- Introduce contactless, multi-operator price-capped ticketing by 2022 in urban areas.
- Buy only ultra low and zero emission buses by 2025.

In return, it called on the Government to:

- Work with the bus industry to develop a National Bus Strategy.
- Put bus travel at the heart of future infrastructure funding for urban transport.
- Give local transport authorities incentives to speed up bus journeys.
- Bring stakeholders together to trial new mobility solutions for rural areas.

- Provide stable funding and support the extra cost of buying zero and ultra low emission buses.

POLICY **GOVERNMENT SETS** **OUT COMMITMENTS** **TO BUSES**

The UK Government made a series of commitments to the bus sector in September, including the UK's first-ever long-term bus strategy and funding settlement and support for local authorities who want to create franchised bus services in their areas.

The Department for Transport said that Superbus networks would have low fares and more bus priority measures to speed up journeys and make them more reliable. The first Superbus network would be introduced across the county of Cornwall. Other Superbus networks would be rolled out in 2020, with the

focus on places that suffer similar problems and where better public transport could significantly improve people's lives.

It was revealed that the £220m funding package announced by Chancellor Sajid Javid includes over £20m for new bus lanes in the West Midlands and a £30m for local authorities in 2020-21 to help “improve current bus services or restore those that have been lost”. It also includes £50m for Britain's first all-electric bus town.

It was announced that the long-term funding package will be announced as part of the 2020 spending review. It would set out the Government's plans to support local authorities which want to pursue London-style bus systems in their areas. The package would also support other areas which would prefer to pursue other forms of co-ordination, such as voluntary or statutory partnerships with operators.



PM Boris Johnson declared his love for buses in a speech in Manchester in August



CPT boss Graham Vidler launched the industry's vision for buses in September

Buses will also be given greater status within wider transport policy. All new road investments in England which receive central UK government funding will be required to either support bus priority measures or explain why doing so would not be necessary or appropriate in that instance. The Government will refresh the department's guidance to local authorities to provide up to date, and relevant advice on prioritising those vehicles which can carry the most people.

OCTOBER

FRANCHISING **CONSULTATION** **REVEALS MANCHESTER** **BUS PLANS**

The Greater Manchester Combined Authority pressed ahead with its launch of a public consultation in October into plans to introduce a franchised local bus network.

Earlier in the month the combined authority had revealed that an independent assessment of the plans had determined that a franchised model would be the best way to meet the region's objectives for buses.

With the public consultation, further details about the plans for the scheme were revealed. A decision about whether to press ahead was proposed to be March 6, 2020.

“To make sure the transition from the current deregulated system to a fully franchised system is as smooth as possible, the scheme proposes that it is done in three phases,” the combined authority explained in its consultation document.

The first phase would cover services in the west of the region around Wigan, Bolton and Salford, with contracts commencing on April 2, 2021. The second phase would cover the north and east of Manchester around Rochdale, Oldham and the north of the city, commencing March 25, 2022. The final phase would cover the remainder of services to the south and south east from March 10, 2023.



TICKETING MORE OPERATORS LAUNCH CONTACTLESS CAPPING

Brighton & Hove, Metrobus and First South Yorkshire became the latest bus operators to offer contactless fare capping in Autumn 2019.

Go-Ahead Group's Brighton & Hove and Metrobus subsidiaries began to allow adult passengers to pay for travel by tapping their bank cards or phones on the ticket machine reader when boarding, and tapping the exit reader when they got off.

Ticket prices remained the same for both contactless and paper options and the cost of the journey is automatically calculated and charged to passengers' bank accounts by the end of the day. The ticket price is automatically capped at the cost of a bus day ticket, no matter how many services passengers catch.

First South Yorkshire began a six-month trial of Tap & Cap ticketing in Doncaster on September 29. This followed the successful introduction of Tap & Cap in Aberdeen in July and formed part of FirstGroup's approach to trialling and rolling out different approaches to ticketing across the UK over several months.

Contactless capping is already offered by Transport for London (since 2012), National Express

West Midlands (2018) and Edinburgh's Lothian (2019).

MANUFACTURERS BAMFORD COMPLETES WRIGHTBUS ACQUISITION

Bamford Bus Company announced in October that it had acquired Wrightbus, the Northern Ireland bus manufacturer.

Ballymena-based Wrightbus had gone into administration on September 25, resulting in the loss of 1,200 jobs. The business was rescued by Jo Bamford, who has an extensive background in manufacturing, purchasing and sales worldwide.

Bamford now serves as Executive Chairman of Wrightbus and Buta Atwal became Chief

Executive. Atwal's experience includes managing operations at major JCB factories.

The new management team said it would focus on stabilising Wrightbus. The iconic Wrightbus brand was retained by Bamford.

"Wrightbus is a proud family business which is part of the fabric of Northern Ireland life and business," said Bamford. "I am delighted to acquire such an established and respected brand"

Jo Bamford is the son of Lord Bamford, the billionaire owner of construction equipment manufacturer JCB. He worked for JCB as managing director of global accounts, but left in 2016. He is the founder and executive chairman of Ryse Hydrogen, which delivers hydrogen to the heavy duty transport sector.



A number of bus companies introduced contactless fare capping during 2019

FUNDING £400M A YEAR LOST FROM FUNDING OVER LAST 10 YEARS

A study published by the Campaign for Better Transport in October revealed that funding for buses in England was almost £400m a year lower than it was 10 years ago, laying bare the effect that successive government funding cuts have had on the industry.

The campaign group said its findings demonstrated that the Government's recently announced plans for a National Bus Strategy must herald a change in the way buses are funded with a multi-year revenue funding settlement as well as capital support for the transition to a zero-emission bus fleet.

CBT analysed government datasets and data obtained from Freedom of Information requests to all local transport authorities in England. It found that UK Government support for buses is now £234m a year lower than in 2009/10. Local authority funding for buses is £163m lower in real terms compared to 10 years ago - a reduction of over 40%. More than half of local authorities have cut their financial support for buses by 50% or more since 2009.

CBT found 10 local transport authorities provided no financial support for buses. These included the counties of Oxfordshire and Cumbria.

NOVEMBER

AWARDS PLYMOUTH CITYBUS NAMED 'BUS OPERATOR OF THE YEAR'

Go-Ahead's Plymouth Citybus subsidiary was named 'Bus Operator of the Year' at the 19th annual National Transport Awards. The presentation ceremony in London was attended by more than 600 people.

The judges observed that Plymouth Citybus had had a year of innovation and growth in 2018. Heavy investment in upgrading the depot, new buses, a new open top service and



Bamford Bus Company announced in October that it had acquired Wrightbus, the Northern Ireland-based bus manufacturer

smarter technology had led to a growth in passenger satisfaction. The Transport Focus 2018 Bus Passenger Survey showed that 93% of Plymouth Citybus passengers were satisfied with their journey.

The award for 'Improvements to Bus Services' was won by the Liverpool City Region Combined Authority for the Liverpool City Region Bus Alliance, which was recognised for its achievements in growing bus use.

Other winners from the bus sector included:

- Contribution to Sustainable Transport: Transport for London for its Low Emission Bus Zone.
- Most Innovative Transport Project: Stagecoach Group and Blink for the First Employee Experience App in UK Transport.

POLICY

'IMMIGRATION REFORM RISKS LABOUR SHORTAGE' WARNS CPT

Plans to introduce a £30,000 annual salary threshold as part of a future immigration system risk a shortage of workers across the bus and coach industry, the Confederation of Passenger Transport warned in November.

CPT, which represents UK bus and coach operators, raised the issue in its response to the Migration Advisory Committee's review of options for a new immigration system. Local bus operators in England have around 100,000 full time employees - a significant proportion of these are non UK nationals and their salaries are below £30,000.

Under the current plans future migrants would have to show that the job they were coming to do in the UK pays more than £30,000 a year. This new requirement would apply to most migrant workers, including EU nationals, who are currently able to work under EU freedom of movement rules.

CPT called for the removal of the minimum salary threshold. It also wanted bus and coach drivers to be listed on a shortage occupation list, which should then be a key characteristic in a points-based system, along with the ability to speak and read English.



Go-Ahead Group's Plymouth Citybus subsidiary was named 'Bus Operator of the Year' at the National Transport Awards in October



Sir Brian Souter (pictured in 1989) stepped down as Stagecoach chairman

DECEMBER

PATRONAGE

BUS USE DROPS ACROSS ENGLAND

The number of people travelling by bus continued to decline across England, according to Department for Transport statistics published in December. Figures for the year to March 2019 showed a -0.7% decrease in bus passenger numbers. The decline in London was more rapid; there the year-on-year reduction was -1.2% in the capital compared to -0.1% elsewhere. The DfT statistics showed that the local bus fares index increased by 3.3% in England in the year to March 2019, faster than the annual all items Consumer Prices Index

rate of inflation (1.9% increase), meaning bus fares had risen in real terms. Local bus fares in England increased by 71% between March 2005 and March 2019. Bus fares have rose at a faster rate in metropolitan areas (93%) than in non-metropolitan areas (67%).

PEOPLE

NEW DECADE, NEW ERA - SOUTER STEPS DOWN

After four decades at the heart of Stagecoach, it was announced in December that Sir Brian Souter would step down from his role as chairman. He became a non executive director of the company he co-founded with his sister, Ann Gloag, in 1980.

Ray O'Toole, a non-executive director, who served as chief operating officer of National Express Group until 2010, succeeded Souter as chairman. Gloag, also a non executive director, retired from the board.

"At the age of 65, the time is right for me to step down as Stagecoach chairman to spend time on my other interests and with my family, including my three young grandchildren," said Souter. "My family and I continue to have a significant shareholding in Stagecoach and I have every confidence in the management

team, our strategy and the positive prospects of the business."

POLICY

TORIES' ELECTION PLEDGE FOR LOCAL TRANSPORT

During December's election campaign, the Conservatives pledged to invest £4.2bn on local transport in England's city regions if they were returned to power.

The party said that the money, which would become available from 2022, would help fund transport projects in eight mayoral or combined authority areas in England: the North East; Tees Valley; West Yorkshire; Sheffield City Region; Greater Manchester; Liverpool City Region; West Midlands; and the West of England.

The party also promised a "national bus strategy" and a long term funding settlement for buses in the 2020 Spending Review.

Conservative party manifesto pledges on transport included:

- Strict new laws on air quality.
- Investment in electric buses, and the UK's first all-electric-bus town.
- Investment in Superbus networks with lower fares – flat fares in urban areas – and increased frequency.
- Keep bus fares low.
- Bring back and protect rural bus routes. ■

THE CASE FOR THE BUS IS NOW WIDELY RECOGNISED



Claire Haigh, Chief Executive of Greener Journeys, explains how the case for the bus gained traction

A decade ago when we launched Greener Journeys' One Billion Challenge we struggled to get much traction. What a transformation today. Once described as the Cinderella mode, the bus is now centre stage. It certainly helps that we have a Prime Minister who is a self-declared "bus nut". But in truth the transformation over the past decade has deep roots across our political class, the business community and decision makers at all levels of government.

Key to success in building the case for the bus was quantifying the wider social, economic and environmental benefits. And as events over the past decade unfolded, it became ever more apparent just how crucial buses are to tackling some of our most intractable problems.

It had always been understood that buses were socially necessary, but quantification of precisely how improvements in bus service connectivity reduced social deprivation ensured real cut through. The result of the 2016 EU Referendum brought into sharp relief the fact that across vast swathes of the country many people felt left behind. The publication in the autumn of that year of our research quantifying the social value of the bus was therefore very timely.

The Value of the Bus to Society set out the vital role the bus can play in

creating a fairer and more inclusive society. A 10% improvement in bus service connectivity is associated with a 3.6% reduction in social deprivation. Bus travel supports education, training, employment and opens up opportunities for all. When Prime Minister Theresa May's focus turned to tackling loneliness we were able to demonstrate how the bus strengthens the fabric of our society and helps tackle loneliness.

Making the social case was so much more powerful given that we had already extensively made the wider economic case. In the wake of the economic crisis we published *Buses and Economic Growth*. Transport Minister Norman Baker described it at the time as a game changer and made it his mission to sell the findings to colleagues across Whitehall. The engagement of the whole sector was also crucial, especially the business community.

Further reports articulated the role of the bus in supporting jobs, growth and productivity. The bus is the primary mode of access to city centres and facilitates 29% of expenditure. Bus commuters generate £64bn in goods and services. Some 400,000 bus commuters are in better more productive jobs as a direct result of their bus service. Investment

in buses supports British manufacturing. At least 80% of urban buses sold in the UK are built in the UK, compared with just 13% of new cars. Expenditure on bus capital projects generates £4.90-£8.10 of wider economic benefit for every £1 invested.

The climate change agenda has become ever more critical. Greener Journeys was formed in response to the 2008 Climate Change Act. Our key message in 2009 was primarily about modal switch: "if everyone switched just one car journey a month to bus or coach instead that would mean one billion fewer car journeys on our roads and a saving of two million tonnes of CO2 every year". Over the past decade there has been a revolution in clean bus technology such that buses are leading the way on the road to net zero carbon emissions.

As the dangers of air pollution came to the fore we moved on to articulating the role of buses in tackling local air pollution, which is linked to 40,000 early deaths a year. A modern diesel bus produces fewer harmful NOx emissions than a modern diesel car despite having 15 to 20 times the carrying capacity. Our report *Tackling Pollution and Congestion* also set out how crucial it is to improve traffic speeds. Halving



Climate change is moving up the agenda. Buses are leading the way on the road to zero



city centre traffic speeds leads to a 50% increase in emissions from larger vehicles. A double decker bus can take 75 cars off the road.

The key question today is how we deliver on the many undoubted benefits of the bus against a backdrop of declining patronage. Recent figures from the Department for Transport show that bus travel has fallen to its lowest level on record.

To begin with we need a national bus strategy. Millions depend on buses to get to work, the shops and their place of education. Buses enable people across the whole of society to access essential services and be part of their community.

The creation of a national bus strategy will need to be a collaborative project with input from many different Whitehall departments as well as engagement by decision makers at all levels from across the public and private sectors. The bus is a quintessentially local product. Sub-national Transport Bodies, Combined Authorities, Local Enterprise Partnerships and all tiers of local government will need to be involved, as well as bus operators,



ABOVE: Buses have an important role to play in tackling local air pollution. BELOW: The launch of Greener Journeys in 2009

bus manufacturers, employers, Business Improvement Districts and town centre managers.

The primary objective of a national bus strategy should be to create a framework to maximise the wider social, economic and environmental benefits of buses. Such a strategy would support key priorities such as meeting our climate change targets, Industrial Strategy Grand Challenges 'Clean Growth' and 'Future of Mobility', the Clean Air Strategy, as well as efforts to tackle the housing crisis, to reinvigorate our towns and city centres, and even to tackle loneliness. It would strengthen local economies, reduce pollution and congestion, tackle social exclusion and build more cohesive communities.

A national strategy focused on maximising the wider benefits of the bus would also support devolution by providing local transport authorities with the necessary funding and powers to invest for inclusive and sustainable growth in their areas. It would help decision makers identify the costs, benefits and risks associated with different interventions. It would provide a framework for



“The key question today is how do we deliver on the undoubted many benefits of the bus against a backdrop of declining patronage”

local decision makers to make the most of the powers in the Bus Services Act to maximise the wider benefits of the bus.

The strategy must focus on the factors causing the decline in patronage. Some of these factors, such as long-term structural

changes in the economy and labour market, increases in online shopping and other disruptive changes, may be beyond the scope of transport policy. However, factors such as rising congestion, bus journey times and fares; the increase in private hire vehicles, and the relatively low costs of motoring will need to be addressed.

If a national bus strategy is to be effective in reversing the decline in bus patronage it must necessarily complement wider transport policy. Bus policy cannot sit in isolation to policies for roads, parking, traffic management and

fiscal measures. Falling bus speeds are a major factor behind declining bus patronage, but building new roads will not reduce traffic congestion. We must make better use of existing road capacity. A bus strategy will require demand management measures to reduce traffic such as the workplace parking levy and road pricing.

Turning the tide will require a major refocusing of Government priorities. Currently the price signals point the wrong way. The freeze in fuel duty since 2011, for example, has caused a 4% increase in traffic, 200 million fewer bus journeys, 4.5 million tonnes of carbon emissions and 12,000 tonnes of NOx. A recent RAC *Annual Report on Motoring* has shown that drivers' dependency on the car has increased, with 33% more dependent on their cars and a quarter of these blaming a deterioration in public transport.

A national bus strategy will need to help the sector ride the wave of change in the fast evolving urban mobility landscape. The emergence of countless new players providing dynamic on demand services is bringing both challenges and opportunities for traditional bus services. The bus strategy will need to create a framework where innovation can thrive.

The case for the bus is now widely recognised. But we cannot ever be complacent. The challenge as always will be to ensure that we articulate precisely how and in what way the bus can assist with tackling Government's most pressing problems.

A fair prediction for 2020 is that in addition to delivering on its central pledge to 'get Brexit done', the Government will be seeking ways to help those neglected northern areas who voted Conservative for the first time. With the UK hosting the COP26 climate summit in Glasgow, the Government will also be under pressure to deliver a credible plan for meeting its net zero target.

It's time for a bus renaissance- it was responsible for more than 40% of all journeys in the 1950s. Getting back to that sort level would go a long way to solving some of our most urgent challenges. ■



The First Bus 'Tap & Cap' contactless payments initiative has got off to a great start. It offers even more flexibility and value for customers

A YEAR OF FIRSTS FOR FIRST BUS

First Bus outlines its progress on embracing technology, renewing its fleet and building partnerships

The last 12 months have been a year of change for buses. The sector in England has produced its vision and strategy for the future. The Scottish Government has announced £500m for bus priority; the UK Government has announced £220m (2020/21) for priority, fares, rural and electrification.

It has also been a year of firsts for us.

Back in May, FirstGroup announced its intention to separate First Bus from the Group as part of wider portfolio rationalisation plans. But against the backdrop of what might be viewed as uncertain times, one

thing remains strikingly certain for us, it's very much business as usual here at First Bus.

In fact the list of 'firsts' we've racked up over the last year is very much testament to our agility and our commitment to delivering the best possible service for our customers.

EVOLVING OUR CUSTOMER PROPOSITION

As we stride ahead into 2020, we continue to embrace new technologies that can enhance the customer experience. It has been more than a year since we became the first national bus operator to accept payment from contactless bankcards on all of our services, following the installation of new Ticketer machines onto all 5,700 vehicles across the UK.

We've since had a lot of success

encouraging our customers to pay digitally using contactless cards and mobile devices for their ease and convenience. During 2019 we have seen significant increases in the numbers of customers choosing to pay with contactless or mobile tickets; for the first time, digital revenues have overtaken cash, which now represents less than 40% of on-bus revenue with contactless and mTicket making up 45%.

To build on this and keep improving journey times and speeding up boarding times, our 'Tap & Cap' contactless payments initiative has got off to a great start. It offers even more flexibility and value for customers; capped contactless payments, however many journeys made. Customers simply tap on the reader each time they board a bus and they are automatically charged the

cheapest available ticket based on the number of journeys they make. Customers can also log into an online portal to see what they have been charged for peace of mind. We launched 'Tap & Cap' in Aberdeen in July, with over 0.5 million transactions to date. Riding on the success of this we rolled it out to Doncaster in October 2019. More schemes are planned for 2020, making using the bus simpler and quicker as well as providing the best value for our customers.

Meanwhile, our First Bus app is now 'best in class' among national bus operators, with around one million active users benefitting from real time, live bus updates and our best value tickets. With an impressive rating of 4.6 stars out of five from iPhone users in the iOS app store it remains the highest ranked UK Bus app. We're

understandably very proud of the app's success and the important support it offers to our customers. Recent improvements include merging planning and purchase capability into one portal, to simplify the process for our customers, and introducing the ability to activate multiple tickets. There's much more in the pipeline for 2020 and plenty of exciting developments still to come.

A CLEANER, GREENER FLEET BACKED UP BY INVESTMENT

We are committed to delivering cleaner air in the cities within which we operate and have seen massive reductions in our exhaust emissions over the last three years.

As part of this commitment by First Bus to improve air quality, we have been retrofitting exhaust systems to Euro 6 standards, which dramatically reduces NOx levels at the tailpipe of our vehicles. With funding support from central Government and our local partners, First Bus has completed 540 retrofits by the end of 2019. As a result, First Bus has reduced NOx emissions by over 90% per vehicle across all the vehicles retrofitted to date. And we are not stopping there; over the next couple of years we are planning a further 1,000 retrofits across all our urban markets.

Taken together with our ongoing investment in new buses, we expect to achieve 60% Euro 6 standards across our fleet by the end of 2021. As of the end of 2019, we will have invested over £225m of our money in some 1,000 new Euro 6 buses.

We are also firmly on the journey to zero emissions. Developing our roadmap to mainstream introduction continues through targeted demonstration projects as technology evolves. Our York Park and Ride network is leading the transition towards electric vehicles and by Spring 2020 will have the largest double-decker electric fleet outside London. New electric buses will also be joining our fleets in Leeds and Glasgow. We will also be introducing 15 next generation hydrogen double-decker buses in Aberdeen next



Partnership working in Bristol has achieved growth in bus use (pictured: Metrobus)

year, in a collaboration with the City Council. And Bristol has seen the first of 77 biogas double-decker buses, as our Bristol fleet begins large-scale rollout of this lower carbon power source.

PARTNERSHIPS THAT BRING RESULTS FOR CUSTOMERS

Establishing effective partnerships with local authorities is a key priority for First Bus. It is critical if we are to tackle the congestion challenge for bus services head-on. By working together with local partners, we can make a real impact on both congestion and air quality and provide better services for our customers, in turn increasing patronage and supporting local communities.

Our flagship partnership with Leeds City Council and the West Yorkshire Combined Authority powered ahead in 2019. The four-year joint investment programme was launched in 2018 with the aim of improving public transport across Leeds and an aspiration of doubling bus patronage by 2026. First Bus has committed to introduce 284 new buses, around half of which are now operating in Leeds and the surrounding area. The local authorities are currently delivering over £180m on bus priority, Park and Rides, real-time information, bus hubs and other pro-bus initiatives. Construction has now started on most of these schemes.

We also have a strong track record of joint working in Bristol. The Greater Bristol Bus Network and most recently Metrobus

dedicated bus routes, have contributed to UK-leading bus patronage growth of more than 53.8% over the last five years. We now aim to build on this success by targeting eight core corridors in the city, with First Bus doubling service frequencies and Bristol City Council investing in bus priority, with the aim of improving bus modal share to 20% of all journeys in Bristol by 2031.

Leeds and Bristol provide potential blueprints for future bus deals elsewhere. We are making real progress here, with the Department for Transport's Transforming Cities funding holding out the prospect of



Our First Bus app is now 'best in class' among national bus operators

"Customers simply tap on the reader each time they board a bus and they are automatically charged the cheapest available ticket based on the number of journeys they make"

real transformational change across many of our markets. We will always stand ready to invest, innovate and drive better performance where we have willing local partners ready to do their bit.

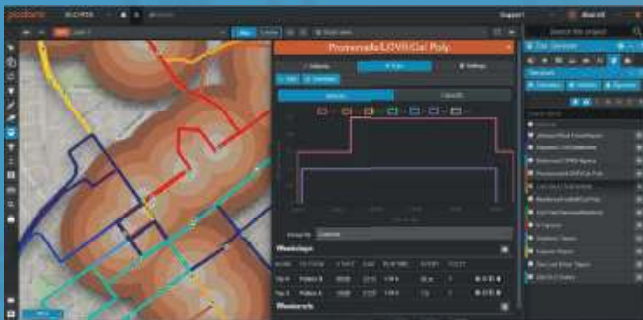
Another very special partnership reached a milestone in 2019. We are celebrating 20 years of working with Unite the Union in a unique learning programme: the Lifelong Learning partnership. The objectives of the Lifelong Learning initiative back in 1999 were, and still are, to grow local access to learning opportunities in depots to better support and develop our people - a key priority for both Unite and First Bus. Originally introduced to help people with literacy and numeracy skills and to support colleagues who did not speak English as their first language, the breadth of courses now on offer in our learning centres has vastly expanded. They now cover driver-specific content including route awareness, health and safety, and customer care as well as opportunities to explore fun, non-work-related subjects as diverse as creative writing and music.

Recently, Learning Centres have also supported transformative projects, such as the launches of new Ticketer machines and our First Bus Connect colleague app, to help both colleagues and First Bus to work smarter, safer and more collaboratively. Thanks to our passionate, caring and dedicated network of Lifelong Learning Coordinators and Trade Union Learning Representatives, who run their local centres, many colleagues over the past 20 years have been inspired to grow their skills, confidence and experience. This is a fantastic collaboration between First Bus and Unite and one that has had a hugely positive impact on colleagues over the past two decades. The first Lifelong Learning Centres were established in Basildon, Glasgow and Leeds, and we now have 32 on-site centres and one mobile classroom in depots across England, Scotland and Wales. That's certainly another first of which we are understandably proud. ■

CLEAN & GREEN

- ✓ We are the UK's biggest operator of electric buses, and our pioneering Waterloo depot won an International Energy Globe Award
- ✓ We operate hybrid geo-fenced electric buses in zero emissions mode in Brighton's town centre and near schools
- ✓ We are pioneering air filtering buses that clean the air as they move around the city

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IT IS EXCITING TO HAVE A PM WHO 'GETS BUSES'



David Brown, Chief Executive of Go-Ahead, sees a real opportunity for positive change

Boris Johnson is back in No.10 and faces an in-tray that will be over-flowing after the General Election campaign.

Knowing the Prime Minister - having worked for him at Transport for London on projects such as the 'Boris Bike' - he will be very clear in his mind about what he wants to do next.

One area in urgent need of attention across the country is public transport.

In the past, buses haven't often grabbed the headlines despite being the backbone of Britain's public transport network.

Some 3.5 million people still go to work by bus, and 73% of all bus journeys are taken by people in the bottom half of the income bracket.

Buses can also empower local communities and provide a vital link for rural towns and villages.

Yet passenger numbers have fallen across the country in the past decade under the pressure of funding cuts.

These issues are now getting more media and political attention than before, providing a real opportunity for positive change.

Boris Johnson seems to have forever been linked with buses - from the New Routemaster in London to the more controversial bright red Brexit one in the 2016 Referendum campaign. He even used to paint buses made from old wine crates.

But now we need the Prime



We operate electric buses in London, powered by our fully-electric depot in Waterloo



We are looking at further rolling out the 'Air Filtering Bus', piloted in Southampton

Minister to follow through and deliver a National Bus Strategy in 2020.

The Department for Transport already has clear strategies for rail, aviation, roads, cycling and walking. And Go-Ahead believes that a national strategy for buses is vital to maximise the benefits bus travel can bring, to the economy, to society and also the environment. The affordable, inclusive and accessible transport provided by buses can form an integral part of tackling challenges such as loneliness, obesity, air pollution, social exclusion and sustainable growth. We want to see a cross Government approach,

embracing the opportunity to save public costs elsewhere in areas like health and social care.

Councils and operators should be set challenging targets for passenger numbers, punctuality and journey times. Congestion in the UK's largest cities is nearly 15% worse than it was five years ago, and local authorities need to be encouraged to use the powers they already have to tackle it.

And Government funding is

"We at Go-Ahead pride ourselves on having one of the cleanest, greenest fleets in the country"

needed to accelerate the move to decarbonise fleets, delivering the PM's vision of a 'clean, green' bus fleet connecting the country.

We at Go-Ahead pride ourselves on having one of the cleanest, greenest fleets in the country.

We have invested in hybrid 'geo-fencing' electric buses in Brighton - buses that can be set to run on 'zero emissions' mode every time they enter the town centre or pass a school, improving air quality.

We are also looking at further rolling out the 'Air Filtering Bus' - which removes pollutant 'PM10' particles from the air as it moves - across the UK after its successful piloting in Southampton.

And we'll soon be introducing electric buses in the North-East and in Crawley and Gatwick - adding to the fleet we operate in London, powered by our fully-electric bus depot in Waterloo.

But if we as a nation want to achieve the targets we have set on tackling carbon and switching to greener fuels, the Government needs to deliver its side of the bargain.

While around a third of Go-Ahead's fleet is the cleanest form of diesel around - Euro 6 - only around 700 of Britain's 35,000 buses are electric. And so far there has been little detail from the Government on how it plans to shift people away from petrol and diesel power and accelerate the green agenda on our roads.

We want to move to a position where bus is seen as the first choice for local travel. We remain focused on customer service and continually strive to make bus travel easier and more convenient for passengers.

We have found through our work with local authorities in Brighton that partnerships work best in determining policies and investment.

I know how passionate Boris Johnson is about public transport. It is exciting to have someone who 'gets buses' in power.

But it's vital now that the Government works with business and local authorities to deliver the framework we all need to get Britain on the right road ahead. ■

West Midlands Bus Alliance



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Any successful city region needs great public transport - and for most people, that means buses

ALLIANCE IS DELIVERING FOR THE WEST MIDLANDS

National Express explains how partnership working has boosted patronage in the city region

The West Midlands Bus Alliance was the first of its kind in the UK. Launched in 2015, the ground-breaking partnership is coming to the end of its first five-year term. So it's time to reflect, take pride in what worked and start thinking about everything we want to achieve in the next five years.

National Express West Midlands fully recognises that our bus network is a crucial public service that is fundamental to a prosperous, inclusive and green city region. Seven out of 10 local people caught a bus last year. Buses are even more important in the West Midlands - a region which suffers from more than its fair share of deprivation and yet contains one of the youngest major cities in Europe - Birmingham.

Everyone at National Express is fully committed to delivering

great service and great value to our customers, every day. But issues like congestion, although they hurt buses badly, are outside our sole control. So along with Transport for West Midlands, we have pioneered the concept of a Bus Alliance to tackle the issues we can't deal with on our own.

Chaired by Transport Focus to ensure that our work is inspired by the voice of the customer, the West Midlands Bus Alliance brings together TfWM, bus operators, local authorities such as Birmingham City Council, as well as CPT and - via the Safer Travel Partnership - the region's police.

So what have we achieved in our first five years?

By focusing on what passengers want, listening to local agencies and always sitting down together to thrash out practical solutions, we have delivered some great results - growth in passenger numbers for several years and average bus speeds that were 1% faster in 2019 than 2018.

As we promised, we are keeping



We spent £10m on 38 brand new top-spec ADL buses for services in Harborne

fares low. In 2020, the biggest-selling ticket in the region - the off-peak bus day ticket - costs exactly the same as it did in 2014. Our low-fare zones are supporting West Midlands high streets - 62% of passengers reported they were travelling more for local shopping.

The West Midlands is leading the roll-out of smart ticketing - in February 2018, National Express West Midlands brought contactless payment to the fleet, and we were the first region outside London put daily capping in place.

In the fight against congestion, the latest example of Alliance

working brought improvements to bus services in Harborne, south-west Birmingham, via a two-pronged approach.

National Express West Midlands spent £10m on 38 brand new top-spec ADL buses. These beautiful new Platinums are low-carbon certified Euro 6 smart hybrids, with comfy seats, extra leg room, free Wi-Fi and USB chargers.

In return, Birmingham City Council and Transport for West Midlands channelled over £3m of Department for Transport funding into putting in a bus lane - speeding up journey times by eight minutes in the morning rush hour.

Joined-up projects like this - buses plus highways - have resulted in stunning passenger growth of 16% on priority routes.

Another area of growth is younger passengers, who have really embraced the Alliance's focus on digital ticketing. Since autumn 2017, apprentices and trainees have been provided with half-price travel. By focusing on making bus travel cheaper and easier, the West Midlands has increased the number of its young people using buses by 12%.

Looking ahead to the next five years, the environment is obviously an increasingly vital priority. The Alliance is well on the way to delivering on our promise for all buses in the West Midlands to be Euro 6 by April 2021.

As the West Midlands Metro expands, the Alliance will need to make sure that multi-modal integration continues to work seamlessly for all of our customers.

All the exciting developments in the region's future - the Birmingham Commonwealth Games, Coventry City of Culture, HS2 - bring the challenge of increasing congestion, especially during the construction phase. But they are also a massive opportunity for public transport. Any successful city region needs great public transport - and for most people, that means the bus.

This region has no time to waste, but the West Midlands Bus Alliance has demonstrated it can deliver what bus users - existing and new - want, and we will carry on doing that for the next five years. ■



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PARTNERSHIP WORKING CAN DELIVER A NEW AGE OF BUS TRAVEL



Mark Threapleton, Chief Operating Officer for Stagecoach UK Bus, foresees a new age of bus travel

The last few months have proved to be an exciting time for the bus industry, and we have seen a step change in the national profile of bus. It's not often that there is consensus among politicians of different colours, but the recent general election was different. For the first time every party focused closely on the challenge of climate change and there was agreement across the board that buses matter and need proper public investment.

This is a big change of heart. In 2012 buses were hit with a big tax hike with the cut in Bus Operators' Support Grant, and in the past nine years public sector budget cuts have seen 3,000 bus routes either slashed or disappear completely. It feels like we are now at a turning point for our industry and the months ahead will see whether those promises are fulfilled.

During the tough years of the last decade, Stagecoach has continued to invest, innovate and improve services for customers and we want to continue that. And the industry is ready and waiting for positive change. We now have our industry strategy, *Moving Forward Together*, with its is very clear message - Government needs to work with operators to improve services, help tackle climate change and drive more passenger journeys.

We need a clear partnership approach to address some of the major issues, such as congestion which is constraining growth and

contributing to poor air quality. We are in a great position to help tackle this growing problem but we need supportive measures driven by Government.

At the heart of our industry strategy is our pledge to work with Government to make every new bus an ultra-low or zero emission vehicle from 2025. This is absolutely the right pledge but it comes with its challenges. Electric buses are currently double the cost of standard buses and there is not the capacity in the manufacturing system or availability in the energy infrastructure to move to an all-electric fleet in the short-term.

At Stagecoach, we are continuing our firm focus on reducing our carbon footprint and looking at every area where we can support cleaner air.

October 2020 will mark 40 successful years since we operated our first bus service. Right from the start, we have pioneered greener and smarter mobility focused on providing cleaner buses and boosting air quality for towns and cities across the UK. We've invested £1bn in 7,000 new greener vehicles in the past decade and by the end of 2020 we will have 100 electric vehicles on the road, more than any other operator outside London. It's a positive step forward to see private and public

sector working in partnership in this area through the Department for Transport's Ultra-Low Emission Bus Scheme. This fund is critical in helping to support the switch to electric, and it is right that buses, which can carry up to 20 times the capacity of cars, get similar support which has already gone to the private car market.

But we also need to work in partnership to drive large-scale modal shift from single-occupancy car trips to the more sustainable mass transit that we can offer. This means making it easier and more convenient than ever before. Our focus in this area has seen us roll out the facility for passengers to pay for their travel with a contactless credit or debit card across our entire bus fleet, as well as Apple Pay and Google Pay



In 2020, we'll be trialling Europe's first full-sized autonomous bus (pictured)



By the end of 2020 we will have 100 electric vehicles on the road (pictured: Guildford)

devices. Contactless now accounts for around a third of all journeys outside London and its popularity continues to grow. Looking ahead, Stagecoach is working with other operators on plans to deliver multi-journey price capping on daily and weekly tickets to make travel easier.

We're also looking to the future in terms of what customer innovation comes next for our industry. In 2020, we'll be trialling Europe's first full-sized autonomous bus across the Forth Road Bridge, building on our long history of innovation. Autonomous technology can make services safer, more efficient and help to deliver better journeys.

But all of this investment and innovation is pointless if we cannot address the serious issues of congestion, climate change and poor air quality in our towns and cities. We need brave steps from local and central Government to help tackle these issues and deliver for our citizens who choose more sustainable transport.

The bus industry is prepared to play its part in helping to deliver the solutions and there's no question that we are firm supporters of the partnership approach but we now need Government to step up and its their part in our future.

Governments and transport authorities will ultimately be judged on whether they prioritise the car, which is responsible for 40% of the pollution in our cities, or genuinely put buses - the mass transit solution to climate change and congestion - first. New solutions to address congestion need to be pushed forward - one example is using the surplus funds that local authorities generate from car parking to reinvest in bus priority schemes.

If we both work together and deliver on our shared responsibility then we can deliver a new age of bus travel. ■

Bus companies ride into the future...

Let passengers tell you how to grow your business

The Bus Passenger Survey (BPS) gives companies detailed comparable, benchmarked passenger feedback.

Our expert advisors can help you understand and apply this valuable insight across your business.

David Sidebottom, Transport Focus's passenger director said: "Operators tell us the survey is an important tool for identifying improvements, setting objectives and delivering better service for passengers."

By signing up to the survey, companies such as First, Go-Ahead, Stagecoach, Arriva and National Express West Midlands, have greatly improved passenger experience and journey satisfaction. They have delivered improved customer service training for drivers, better ratings for value for money, and design features for new vehicles.

This year, almost

9 in 10

passengers said they were satisfied with their bus service overall (88 per cent across the English areas covered)

If you want more information about getting more from the BPS in 2020, contact our senior insight advisor, Robert Pain, at Robert.Pain@transportfocus.org.uk or on 0300 123 0835

transportfocus 



West Midlands Mayor Andy Street attended the launch of the 'Give Bus a Go!' campaign at Wolverhampton Bus Station

GETTING PEOPLE TO 'GIVE BUS A GO!'

Transport Focus is working with partners, including bus companies, to help make bus more attractive

Nearly 50,000 passengers in England and Scotland took part in Transport Focus' annual *Bus Passenger Survey* (2018). The survey shows overall passenger satisfaction at 88% in England and even better at 91% in Scotland.

Three out of five passengers (74%) are happy with punctuality, 85% are happy with journey time and 64% fare payers are satisfied with the value for money.

So, with what appears to be successful levels of bus user satisfaction, why do many areas and operators struggle to attract new customers to maintain a healthy growing bus market?

In September 2019 Transport Focus launched a campaign to encourage more people in the West Midlands to 'Give Bus a Go!'

As we know from the Bus

Passenger Survey results, people who use the bus love the bus! Other Transport Focus research also tells us that around a fifth of car journeys could well be made by bus. Yet many people don't view the bus as a transport mode of choice.

Reducing barriers to bus travel is vital - to help more people choose bus and make buses a more attractive and sustainable choice. Existing bus passengers want more reliable, frequent services going to more places, simpler fares that are better value for money and more useful information.

As the independent bus passenger watchdog, Transport Focus has chosen to work in-depth in the West Midlands.

The region is bucking the national trend of falling passenger numbers. This is no accident - the West Midlands has a large population, engaged local authorities and bus operators, and a dynamic regional Bus Alliance that Transport Focus chairs.

The key aims of the campaign are:

- identify the barriers to bus as a mode of transport choice for people in the West Midlands;
- identify interventions to break down these barriers by concentrating on key passenger priorities for improvement - value for money, punctuality and more useful bus information;
- share the learning and emerging best practice gained to influence operators, local authorities and governments across England, Scotland and Wales to encourage more people to use bus.

Nine people who rarely or never travelled by bus agreed to try using them throughout September 2019. These 'Busketeers' ranged in age from 15 to 78 and lived across Birmingham and the Black Country. After a briefing meeting in Birmingham, the Busketeers

"As we know from the Bus Passenger Survey results, people who use the bus love the bus!"

came to a launch event in Wolverhampton where they met colleagues from Transport Focus, Andy Street (Mayor of the West Midlands), local bus operators and Transport for West Midlands as well as speaking to local and regional media.

Then throughout the month of September the Busketeers sent in reports of their journeys (234 in total) using our app, including photos and videos. They were asked to rate each report and almost three quarters were positive or very positive.

So, what did we learn? Well, the Busketeers activity works! Our volunteers shared some brilliant experiences, and we collected lots of reports, photos and videos which we will use to help make improvements. Overall the findings support what we know from our work on bus passenger satisfaction and priorities for improvement - but the information is more local and actionable. Our Busketeers told us that offering the core product - a good network of routes served by consistently punctual and reliable bus services that offer good value for money - is critical to both keep people using buses and to persuade other people to Give Bus a Go!

What next? Transport Focus shared the findings with local bus operators and Transport for West Midlands through the West Midlands Bus Alliance and developed a published action plan.

Transport Focus, working in partnership with National Express West Midlands and Transport for West Midlands will explore in more detail, through new passenger research, priority areas for improvement. We will report on what we find about value for money, bus punctuality and passenger information later in 2020.

Transport Focus wants to help make bus more attractive. All the better if people make bus a genuine decision driven by industry and governments offering more choice to users.

Bus can potentially provide flexible, responsive and quick solutions. We look forward to working with governments, local authorities and bus companies to make this happen. ■



Now in its 18th year the Scottish Transport Awards, supported by the Scottish Government and Transport Scotland, continues to recognise excellence in transport and reward innovation and progress for transport initiatives which are really working across the nation.

The awards are free to enter and the judges welcome any updates to projects submitted in previous years.

Roy Brannen, Chief Executive, Transport Scotland said:



These Awards are a great opportunity to recognise the contribution by our professionals in improving and enhancing Scotland's transport networks. Everyday Transport Scotland sees the effort, collaboration and results from everyone involved in providing a successful journey for Scotland's travelling public.

NOMINATIONS ARE BEING ACCEPTED IN THE FOLLOWING CATEGORIES

Best Bus Service / Most Effective Road Safety, Traffic Management & Enforcement Project / Best Practice in Travel to School and Work Schemes / Excellence in Walking, Public Realm and Cycling / Most Innovative Transport Project / Contribution to Sustainable Transport / Airport of the Year / Road/Rail Contractor of the Year / Excellence in Technology & Innovation / Transport Team/Partnership of the Year / Excellence in Travel Information and Marketing / The Public Transport Operator of the Year / Frontline Employee of the Year / Excellence in Transport Accessibility

Winners will be announced at the Scottish Transport Awards ceremony which will take place on 11th June 2020 at the Crowne Plaza Hotel in Glasgow. As with previous years we will also host the Scottish Transport Summit on the same day.

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OUR SPEAKERS

Addressing the future of local bus services in the UK

BARONESS VERE



Minister with Responsibility for Buses, Department for Transport (Keynote address)

Baroness Vere of Norbiton was appointed as a Parliamentary Under Secretary of State at the Department for Transport on April 23, 2019. She was previously a Government Whip (Baroness in Waiting) from December 21, 2016 to July 26, 2019.

Before entering politics, Baroness Vere spent four years as the Executive Director of the Girls' Schools Association, including six months as the General Secretary of the Independent Schools Council. Prior to that she was the CEO of Big White Wall, an online mental health service, and Finance Director at Recruit Media, a digital recruitment agency. Her early career was spent in investment banking.

ANTHONY SMITH



Chief Executive, Transport Focus (Session Chair)
Anthony Smith is the Chief Executive of

Passenger Focus. Having qualified as a solicitor, Anthony worked for five years as principal consumer lawyer for the Consumers' Association, publishers of Which? This was followed by a year as the legal consultant for Consumers International, a worldwide federation of consumer groups. Prior to joining Passenger Focus, Anthony was deputy and acting director of ICSTIS, the regulator of premium rate telephone services.

CHAIR, TRANSPORT SELECT COMMITTEE
(To be confirmed)

LAURA MURDOCH



Director for Bus, Accessibility and Active Travel, Transport Scotland
Laura Murdoch

joined Transport Scotland as Director of Bus, Accessibility and Active Travel (a newly-created role) in September 2018. Before joining she worked for many years in various roles at the Department for Education, most recently on delivering the free schools programme. As well as central UK and Scottish government, she has also worked for the Director of Children's Services at Tower Hamlets.

As Director of Bus, Accessibility and Active Travel, Murdoch oversees the delivery of an ambitious policy agenda working with delivery partners and operators to improve sustainable, accessible transport options and get the travelling public back on the buses, walking, cycling and wheeling. Her team also operates the concessionary travel scheme for disabled and older people and is working with operators to ensure all journeys on Scotland's bus, rail, ferry, subway and tram networks can be accessed using some form of smart ticketing or payment.

GRAHAM VIDLER



Chief Executive, CPT
Prior to joining CPT Graham Vidler worked

in a wide variety of roles in financial services, most recently as Director of External Affairs for the workplace pensions trade body, the Pensions and Lifetime Savings Association. He has also worked as a researcher in both the House of Commons and the Scottish Parliament, led the policy team at Which? and, as Director of Communications, was a member of the start-up team which created the UK's largest pension scheme, NEST.

DAVID BROWN



Chief Executive, Go-Ahead
David Brown is Group Chief Executive of

The Go-Ahead Group, one of the UK's leading public transport providers. The Group, which was established over 30 years ago now employs more than one billion passengers each year on its trains and buses. Go-Ahead's rail operations, GTR and Southeastern, are responsible for around 30% of all UK train passenger journeys and its bus services run from Plymouth to Newcastle, as well as operating a quarter of all London's buses. Go-Ahead has an expanding international footprint operating buses in Singapore and Ireland, and rail contracts in Germany and Norway from November 2019.

David was previously Chief Executive of Go-Ahead's London Bus division and MD for Surface Transport at Transport for London. At TfL his responsibilities included London Buses and the Red Route road network, congestion charging, and the introduction of the capital's cycle hire scheme. He has 35 years' experience working across both the public and private sectors delivering transport solutions. David is a Board member of the Rail Delivery Group and Non-Executive Director of Renew Holdings plc.

ANDY EASTLAKE



Managing Director, LowCVP (Session Chair)

Andy Eastlake was appointed as the LowCVP's Managing Director in April 2012, after serving both on the board and as chair of the Members Council for many years. Andy has a strong background in vehicle engineering, specialising in powertrain developments, fuel economy and emissions.

Andy was formerly Group Head of Commercial and Projects at Millbrook Proving Ground where he led the work on powertrain test and development programmes and alternative fuels for a variety of global OEM customers. As head of laboratories Andy was responsible for all technical aspects of the Millbrook business and for government and European legislative relations. He joined Millbrook after a year's training with Vauxhall Motors by whom he was sponsored to study for a degree in Mechanical Engineering at Southampton University.

Andy is a Fellow of the Institution of the Mechanical Engineers and was formerly a Board member of CENEX the Centre of Excellence for Low Carbon & Fuel Cell Technologies.

GARETH POWELL



Managing Director - Surface Transport, Transport for London

Gareth Powell has been Managing Director, Surface Transport at Transport for London since 2017. He has overall responsibility for the safe day-to-day operation and improvement of London's bus network, roads, the Overground rail network, trams, the Docklands Light Railway, cycle hire, and for congestion and emissions charging. Since joining TfL from consultancy firm Atkins in 2003, Gareth has delivered significant change, innovation and service improvement in a range of senior roles, including Director of Business Planning & Performance, Director of Strategy & Service Development at London Underground, and Director of Public Transport & TfL Strategy.

CLAIRE HAIGH



Chief Executive, Greener Journeys
Claire Haigh is Chief Executive of Greener Journeys, a

coalition of the UK's major public transport groups committed to encouraging people to make more sustainable travel choices. She

also chairs the Delivery & Impacts Independent Review Panel for the Government's Joint Air Quality Unit (DfT/Defra), is the Executive Director of the Transport Knowledge Hub, a Director and the Vice Chair of the Low Carbon Vehicle Partnership, and has been a Board Member of Transport for Greater Manchester. Previously she was Project Director for Journey Solutions, where she was responsible for the creation, implementation and roll-out of PLUSBUS, the first national multi-operator bus-rail ticket.

CLLR LIAM ROBINSON



*Transport
Portfolio Holder,
Liverpool City
Region Combined
Authority
Cllr Liam*

Robinson is a Liverpool City Labour Councillor, who has represented the Kensington and Fairfield Ward since 2008. He was elected Chair of Merseytravel in June 2012 and has subsequently been appointed Portfolio Holder for Transport for the Liverpool City Region by Mayor Steve Rotherham and the Combined Authority. Merseytravel is the delivery arm for transport of the Liverpool City Region Combined Authority.

Cllr Robinson has key roles in strategic transport groups, including having been a founder Board Member of Transport for the North, Rail North and having chaired the City Regions Transport Special Interest Group.

Making public transport more affordable, particularly for young people, is a key focus for Cllr Robinson. He has championed the introduction of reduced price bus fares for young people up to their 19th birthday, which has led to a 168% growth in young persons journeys. He has also lead the procurement of a brand new fleet of publicly-owned trains for the Merseyrail network. He has spent his career working in public transport having held management positions in the rail, bus and coach industries including managing three of Britain's largest railway stations: Liverpool Lime Street, London Liverpool Street and Sheffield.

MARK FOWLES



*Managing
Director,
Nottingham City
Transport
Mark Fowles
trained and*

worked as an electronics engineer before returning to university to study Environmental Sciences. He was employed as an analytical chemist with the Ministry of Agriculture before joining National Bus's senior management training scheme in November 1984. In 1994 he moved from Yorkshire Woollen to Nottingham City Transport (NCT) as Deputy MD where he lead NCT's successful bid for the construction and operation of Nottingham Express Transit (NET) scheme.

Mark became MD of NCT in the autumn of 2000 and in 2001 restructured the company to accommodate the introduction of NET Line One. This change has produced year on year passenger growth allowing massive investment in the company's operational bus fleet. The average age of the fleet today, at 4.5 years, is less than half of what it was when he became MD.

Mark has been the Chair of Traveline for the last 10 years. He has made a special study of Operational Management obtaining his MBA in this subject in 1989. He is a Fellow of the RSA and remains a committed environmentalist.

JANE GRATTON



*Head of People
Policy, British
Chambers of
Commerce
Jane Gratton*

is Head of People Policy at the BCC. She has worked at the British Chambers of Commerce since 2017 and has led on business environment policy including skills, transport and infrastructure. She was the BCC's Planning Policy Fellow from 2015-2017.

Prior to joining the BCC, Jane was Deputy Chief Executive at the Staffordshire Chambers of Commerce, heading up the policy team and overseeing strategic partnerships.

LYNN CRAMMAN



*Business
Development
Manager, Cobalt
Business Park
Lynn Cramman
is the Business*

Development Manager at Cobalt Business Park. Since starting the role in 2006 she has seen the park grow from 5,000 to 14,000 staff. By working closely with the local council on plans for infrastructure improvements and bus operators in the North East, Cobalt now has 12 direct bus services connecting staff to 40 key destinations around the region. Lynn has been involved in many travel projects over the years, including the most recent trial of travel tracking through the sites exclusive app.

DAVID TUCKER



*Chair,
Federation of
Small Businesses
Transport
Policy Unit
David Tucker*

is a Chartered Engineer and a Member of both the Institution of Civil Engineers and the Institution of Highways and Transportation. David has been a principal partner of specialist transportation consultancies for over 30 years and founded David Tucker Associates, based in Henley-in-Arden, in 1999. David is Chair of the Federation of Small Businesses' National Transport Policy Committee.

David has extensive experience in the planning, design and construction of a wide variety of transport projects in both the public and private sector and specialises in highways, traffic and transportation planning and design, including traffic and environmental impact studies. His experience includes project appraisal, master planning, scheme development, statutory procedures, training, preparation of planning, highways and transport agreements, presentation of expert evidence and scheme implementation. David has been involved in many projects including port development, new transport infrastructure, wind energy

parks, urban redevelopment, rail freight facilities, new settlements, industrial, commercial, residential, retail, health, leisure and education related developments.

TOM THACKRAY



*Director of
Infrastructure
and Energy, CBI
Tom Thackray
leads the CBI's
policy work*

on infrastructure and energy, aiming to improve business connectivity and ensuring the UK maintains a secure, affordable and low-carbon supply of energy. In his time at the CBI Tom has held a variety of roles including leading the CBI's Innovation and Enterprise teams, covering policy issues relevant to small and medium-sized businesses and the digital and creative industries. He is an experienced advisor to government and has contributed to ministerial groups on research and innovation, cybersecurity and small business. Prior to joining the CBI Tom worked in public affairs consultancy in Brussels and London.

STEPHEN FIDLER



*Director of Local
Transport,
Department
for Transport
(Session Chair)
Stephen Fidler*

is Director for Local Transport at the Department for Transport. His directorate is responsible for the Major Road Network, local roads, buses and taxis, inclusive transport, cycling and walking and local authority transport infrastructure projects. It also includes two analytical teams who work closely with their policy counterparts and produce influential statistics, evidence and analysis including the world-leading National Travel Survey.

Stephen has worked on transport issues across central government for over 20 years, including in the then Department for the Environment and the No 10 Policy Unit. Before starting his current role in June 2019, Stephen headed the department's client team for Highways

England - leading on the £15bn Road Investment Strategy and major projects including the A14 Cambridge-Huntingdon and A303 (Stonehenge) schemes.

Stephen received an OBE for services to transport in the 2019 New Year Honours List and is a Fellow of the Chartered Institution of Highways and Transportation.

ANDREW CARTER



Chief Executive, Centre for Cities
Andrew Carter became Chief Executive of the Centre for Cities

in April 2017. Before that he was the Deputy Chief Executive and Director of Policy and Research with overall responsibility for the Centre's research and policy programme.

Andrew has over 20 years of experience working on urban economic policy issues for public and private development agencies, consultants and research institutes. He has also spent time in the US as part of the Churchill Foundation's Fellowship Programme reviewing urban economic development policy and practice in American cities including New York, Washington DC, Boston and Chicago.

He is a regular media

contributor and chairs and speaks at conferences across the UK and Europe on a wide range of urban and economic issues.

MARK THREAPLETON



Chief Operating Officer, Stagecoach UK Bus
Mark

Threapleton has worked in the transport industry all his working life, starting in 1976 with South Yorkshire PTE. He joined Stagecoach in 1996 as Operations Director in Manchester before becoming Operations Director for the UK Bus Division in 2000.

Mark then became Managing Director Manchester from 2002 - 2010 before moving to London to become Managing Director.

Mark became Stagecoach UK Bus Managing Director - England & Wales in April 2017, which led to his current role as Chief Operating Officer as of 2019.

PETER FERGUSON



CEO, Prospective
As CEO of Prospective, Pete Ferguson leads a team of data scientists,

software engineers and transport

experts from UCL, Cambridge and the Alan Turing Institute in the development of a cloud platform for urban planning. Backed by the UK government following a major national competition, the company has developed a continuously up to date picture of the UK's transport network, development supply and land use activity and the tools to quickly process and analyse this data at scale. The platform has already been used to help major government, real estate and transport organisations to quickly test many alternative planning policies, development plans and operational strategies in the early stages of the design process.

Prospective's founding team includes urban analytics pioneers Professor Sir Alan Wilson (CEO of the Alan Turing Institute) and Professor Mike Batty (UCL Professor of Planning) and experts in systems modelling, Machine Learning and the use of cloud technologies for geospatial analysis.

Pete has been working across the transport, real estate and planning sectors for 12 years with a focus on the development and application of novel data analytics and modelling tools.

He is an Honorary Research

Associate at the Centre for Advanced Spatial Analysis (CASA) at UCL where he is undertaking doctoral research in network science and where he has published widely on the impacts of transport network design on energy consumption and carbon emissions in cities.

GERARD WHELAN



Director, Corporate Finance, Government and Infrastructure, KPMG

Gerard Whelan is a consulting economist with 25 years of experience leading and working with multi-disciplinary project and client teams on transport strategy and transport investment opportunities. Prior to joining KPMG he was a Divisional Director at SYSTRA, the transport consultancy business of SNCF and RATP, and before that a Senior Lecturer in Transport Economics and Transport Policy at the University of Leeds. He provides advice across the transport sector on market regulation, competition economics, pricing and charges, cost and performance benchmarking, economic impact assessment and business case development.

AGENDA

09:00-09:15

Keynote Address

Baroness Vere, Minister with Responsibility for Buses, Department for Transport

09:15-10:45

Session 1: The investment case for the bus and why we need a bus strategy

Chaired by Anthony Smith, Chief Executive, Transport Focus
■ Chair, Transport Select Committee (TBC)
■ Laura Murdoch, Director for Bus, Transport Scotland
■ Graham Vidler, Chief Executive, CPT
■ David Brown, Chief Executive, Go-Ahead

10:45-11:15

Refreshment Break

11:15-12:30

Session 2: What's the role of the bus in achieving clean growth and net zero?

Chaired by Andy Eastlake, Managing Director, LowCVP
■ Gareth Powell, Managing Director - Surface Transport, TfL
■ Mark Fowles, Managing Director, Nottingham City Transport
■ Claire Haigh, Chief Executive, Greener Journeys
■ Cllr Liam Robinson, Transport Portfolio Holder, Liverpool City Region

12:30-13:30

Lunch

13:30 - 14:45

Session 3: Buses, business and retail

Chaired by Anthony Smith, Chief Executive, Transport Focus
■ Jane Gratton, Head of People Policy, British Chambers of Commerce
■ Lynn Cramman, Business Development Manager, Cobalt Park
■ David Tucker, Chair, Federation of Small Businesses Transport Policy Unit
■ Association of Town & City Management (invited)
■ Speaker TBC, British Retail Consortium (invited)

14:45-15:15

Refreshment break

15:15-16:30

Session 4: Making the most of the Bus Services Act

Chaired by: Stephen Fidler, Director of Local Transport, DfT
■ Mark Threapleton, Chief Operations Officer, Stagecoach
■ Gerard Whelan, Director, Corporate Finance, Government and Infrastructure, KPMG
■ Pete Ferguson, Chief Executive, Prospective
■ Andrew Carter, Chief Executive, Centre for Cities

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