



# The Bus Services Bill: An Overview

This document summarises the main measures in the Bus Services Bill and explains how they are intended to work in practice.

## The Government wants to:



Grow bus passenger numbers



Enable a thriving and innovative commercial bus sector



Tackle air quality hot spots



Help cities and regions unlock opportunity and grow their economy



Improve bus services for passengers

## The Bill helps achieve this by:



Strengthening arrangements for partnership working in the sector, by introducing 'Enhanced Partnerships'



Introducing new franchising powers with decisions at a local level



Providing for a step change in the information available to bus passengers

## The Bill will not:

✗ Impose particular solutions

✗ Affect bus services operating wholly within Scotland, Wales, Northern Ireland or London

# Delivering for passengers

Buses support our economy and connect our communities to the workplace, as well as to vital public services such as healthcare and education. They help to reduce congestion in our urban areas, with cleaner bus technologies also contributing significantly to improving air quality.

## England's most used form of public transport

Buses are England's most used form of public transport accounting for over 60% of all public transport trips<sup>1</sup>, and with over 4.65 billion passenger journeys completed in 2014/15<sup>2</sup>.

Since 2004/05, bus use in England outside London has increased by 2%<sup>3</sup>. But the picture is mixed. In our metropolitan areas bus use has declined by 7% since 2004/05<sup>4</sup>, whereas in non-metropolitan areas it has increased by 9%<sup>5</sup>. There is a wide disparity in the performance of local bus services across England, with areas such as Brighton and Hove and Nottingham having the highest number of bus journeys per head, more than three times the England outside London average of 50 journeys<sup>6</sup>.

Bus use has grown dramatically in London, rising by 31% since 2004/05<sup>7</sup>. There are many characteristics which set London apart from other areas across the country, such as population density and growth, and policy choices such as the congestion charge. London, however, has demonstrated that where bus networks are extensive, services frequent, and passengers have easy access to information about fares and services, bus patronage can increase.

This suggests that there is scope for improvement in the current legislative framework. This view was reinforced by discussion with local authority and bus industry representatives at a series of 'Bus Reform Workshops' held in autumn 2015<sup>8</sup>.

Passenger satisfaction levels are at 86%<sup>9</sup> but passengers still identify room for improvement<sup>10</sup>.



Better value for money from bus journeys



More buses arriving on time at your bus stop

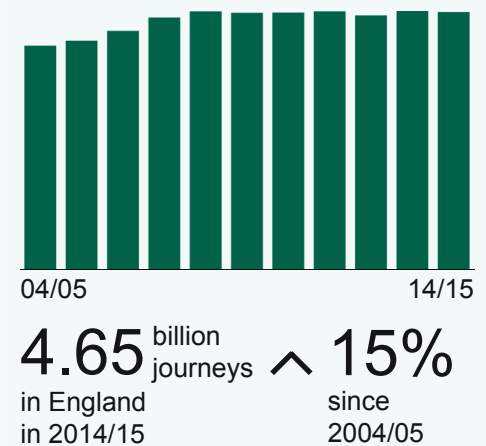


More journeys on buses running on time

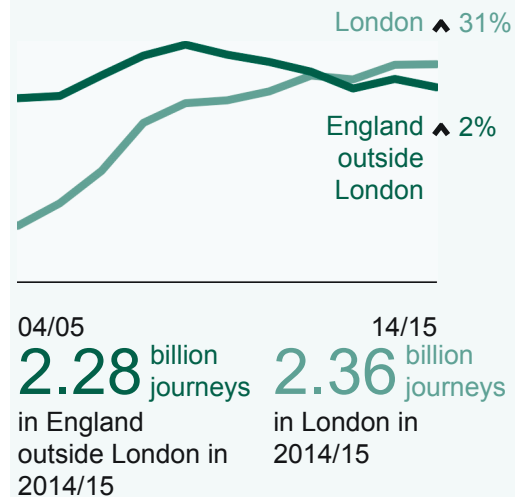


Buses running more often than they do now

## Bus use in England



## Over half of bus use in London



## Top local authorities for bus use

England outside London, journeys per head

Brighton and Hove 158

Nottingham 153

Reading 119

Tyne and Wear 107

West Midlands 98

50 bus journeys per head average for England outside London in 2014/15

## The benefits of better bus services

Better bus services can prove the key to unlocking economic growth, and we know that there is significant untapped growth potential in our cities, regions and rural areas. Buses also help battle congestion, helping to keep our city and town centres accessible for all. Community transport also provides crucial services that both encourage growth and reduce isolation by linking individuals and communities to existing transport networks, work, education, shops and services.



### Employment and economic benefits

- ▶ 52% of all public transport commuting trips by non-London residents are made by bus<sup>11</sup>. Better transport provides opportunity and increases productivity. Local employers rely on bus links to provide them with a flow of qualified employees.
- ▶ Bus networks in England's six metropolitan areas are estimated to generate £2.5 billion of economic benefits per year, £1.3 billion of them through access to work, training, shopping and leisure opportunities<sup>12</sup>.



### Air quality and reduced congestion

- ▶ Buses also help battle congestion in our city and town centres, helping to keep them accessible for all - without buses congestion in city centres would be 21% higher at peak times, causing more congestion and millions of pounds of lost productive or leisure time<sup>13</sup>.
- ▶ Buses can also be part of the solution to our air quality problems. Low emission buses – such as electric or bio-methane vehicles – offer significant carbon dioxide savings and improved air quality.



### Accessibility

- ▶ Where commercial bus services are not viable, the community transport sector can offer services that address local needs and increase patronage. The sector is well placed to serve more isolated communities, with approximately 8 million passenger trips taking place in rural areas<sup>14</sup>.

## Innovation already leading to success

A great deal has already been achieved through innovation and joint working between Government and the bus industry<sup>15</sup>. The de-regulated bus market works well across much of England – but there is room to improve.



Passenger satisfaction levels at 86%



Almost 90% of buses accessible



Promoting low emission buses on our roads



Doubling of the number of buses with CCTV



Smart ticketing on 9 out of 10 buses

# What does the Bill do?

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We want to unlock the significant potential that exists for the bus industry to achieve more for passengers than it does today. Central Government's role is to provide local authorities and bus operators with the tools they need to improve local bus services and get more people on to buses. So the Bill will expand the range of tools available by introducing new powers and improving the approaches that are currently available.

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## Partnership

Existing Quality Partnerships will be made more attractive by removing the requirement that the scheme involve the provision of specific facilities such as infrastructure.

New Enhanced Partnership powers will enable local authorities to work with bus operators to set a vision for bus services in their area and a plan to help achieve those improvements.



The enhanced partnership scheme made by the local authority can set standards for local bus services – including vehicle specifications, branding, ticketing and service frequencies.



Ticketing requirements will apply to all scheme operators, and may include smart ticketing, discounts (such as child fares) and marketing requirements.



The local authority and operators will produce the scheme in partnership. The authority can only adopt the scheme if they have sufficient support from operators.



The local authority will be able to take on responsibility for bus registration from the Traffic Commissioners – enabling them to manage and enforce the new standards.

## Franchising

New franchising powers will replace the existing Quality Contract Scheme powers. The new franchising powers will allow local authorities to take control of their local bus services, like the Mayor of London and Transport for London (TfL).



### **New powers**

Combined authorities with directly elected Mayors will be given powers to franchise local bus services in their area.



### **New responsibilities**

The Mayor will have responsibility for determining which bus services should be provided.



### **Operators**

Operators will then bid for the right to operate those services or apply for a permit to operate a service in addition to those specified by the authority.



### **Transparency**

The final decision to move to a franchised network will need to be taken in a transparent and democratic way by the Mayor.

## Open data and ticketing

These new powers will make it easier for passengers to use buses and to access timetables, fares, routes, the location of services and the arrival time of services. By integrating this new approach with bus registration we will strip out duplication and streamline processes.



## Other improvements

The Bill implements a competition recommendation in relation to the bus registration process to give local authorities powers to:

- get information about passenger numbers and the revenue of a service that an operator intends to cancel or has cancelled.
- give this information to potential bidders if the authority decides to support the service that has been cancelled. This will make sure there is a level playing field for bidders and help local authorities take better decisions on whether or not to support services.

The Bill also exempts rail replacement bus services procured by train operating companies from bus service registration requirements, recognising that these services are often provided at short notice, and for limited periods of time.

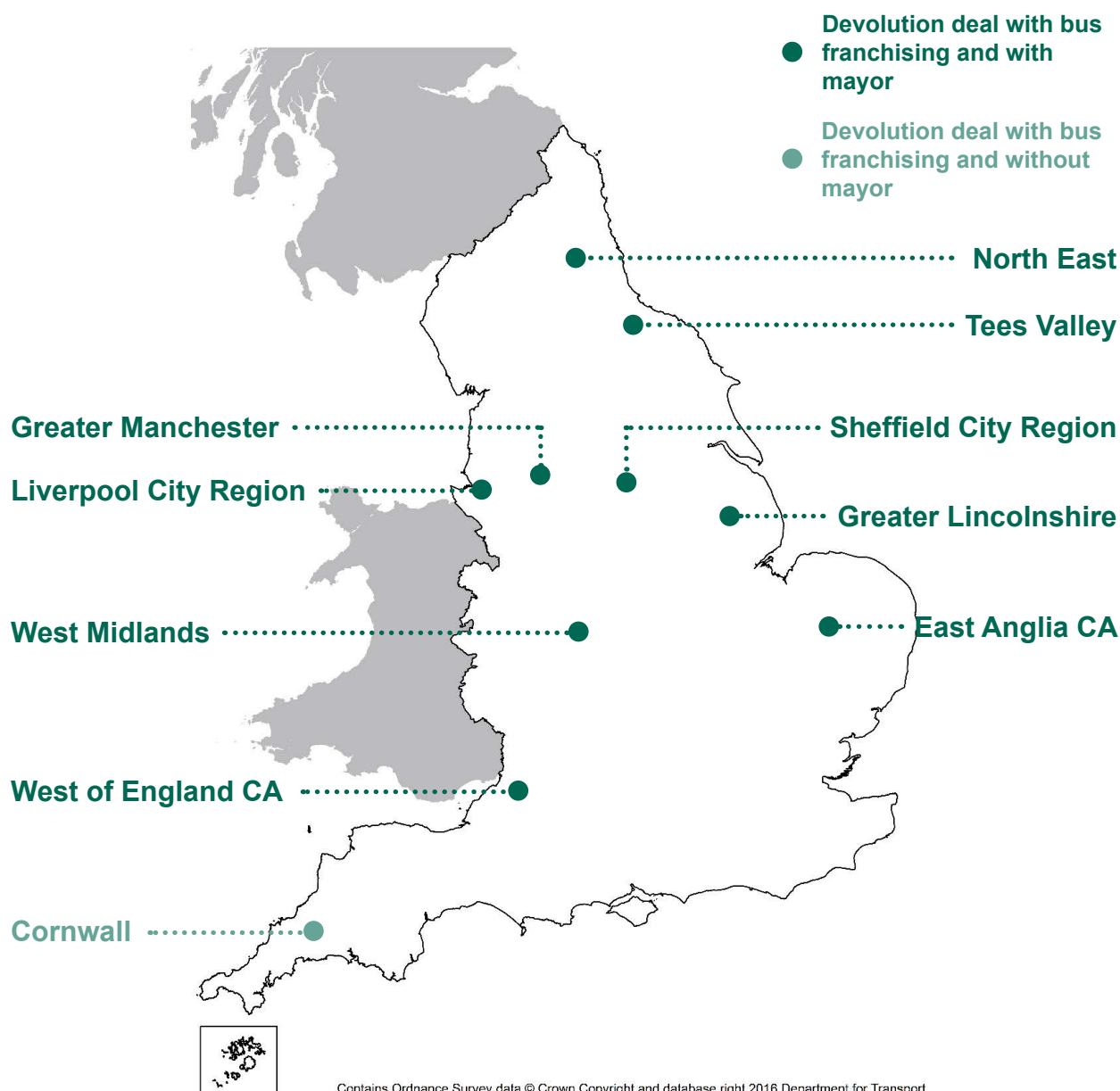
# How will the Bill support devolution?

Devolution deals – signed with local authorities across the country – allow for local decisions to be taken to drive growth, investment and improve services for local people. Each deal is different but all devolve far-reaching powers over economic development, transport and social care. Several deals include new bus franchising or partnership powers – which are included in the Bill.

The Bill enables devolution. Mayors and local authorities will be free to determine the best way of improving bus services for local people.

## Bus franchising and devolution

It is now for these local areas to determine which approach they wish to take to improve their bus services.



# What will the Bill do for passengers?

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We have worked closely with stakeholders to understand the expectations of bus passengers, bus operators and Local Government to develop this Bill. Together we have identified opportunities for buses to play a much greater role in the life of communities across England, helping people get around and helping them get on.

The Bill provides a new legislative framework for bus operators, elected Mayors and local authorities to make these opportunities a reality. Used well, these powers will lead to better journeys, better places and better value for taxpayers and passengers.

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## Using the Bill's powers to deliver for bus passengers

Better bus services can prove the key to unlocking economic growth, and we know that there is significant untapped growth potential in our cities, regions and rural areas. The policies set out in the Bill are designed to make bus services more attractive and benefit passengers, helping to improve patronage. The powers in the Bill could be used to achieve all of the outcomes listed below:



### Better journeys

- ▶ New buses – potentially with WiFi and USB sockets.
- ▶ Better bus networks – serving more or different locations, operating at night or weekends.
- ▶ Faster journeys.
- ▶ Easier, contactless payment.
- ▶ More tickets that work across operators and modes.
- ▶ A step change in information – know when your bus will arrive and how much it will cost.
- ▶ Services that are more accessible for passengers with disabilities.



### Better places

- ▶ New and better links to job opportunities.
- ▶ Increased productivity.
- ▶ Fewer car journeys in congested town centres.
- ▶ Fewer isolated communities.
- ▶ Low emission buses – improving air quality.
- ▶ Thriving community transport services.



### Better value

- ▶ New and different types of discounts, for apprentices, job seekers and other groups.
- ▶ Better competition between operators.
- ▶ Fares that are easier to compare.
- ▶ Services provided by commercial operators who remain free to innovate.
- ▶ More joined-up services – buying regular bus services, schools services and health transport together.



The proposals in the Bill can help deliver many of these outcomes, providing passengers with better journeys, better value and better places to live.

## Enhanced Partnerships



### Enhanced Partnerships can help achieve better journeys by:

- ▶ Enabling bus operators and authorities to work jointly to innovate and respond quickly to passenger demand.
- ▶ Setting the types of payment that must be accepted, allowing for easier contactless payment
- ▶ Requiring certain information to be given to passengers.



### Enhanced Partnerships can help achieve better places by:

- ▶ Identifying the optimal bus services needed in an area.
- ▶ Setting standards for buses in the area – including for emissions and accessibility.



### Enhanced Partnerships can help achieve better value by:

- ▶ Enabling common ticket rules and fare zones to be set up across all services and operators in the area, including discounts for apprentices or other passengers as required.
- ▶ Allowing the price of multi-operator tickets to be set so that they can be used on different operators' services and modes of transport.

## Franchising



### Franchising can help achieve better journeys by:

- ▶ Giving Local Government the power to decide:
  - what buses services run where and when.
  - the types of ticket available including discounts for apprentices or other passengers as required.
  - what types of payment must be accepted including smart and contactless.
  - what information is available to passengers.
  - whether additional accessibility features are needed in their area – such as talking buses.



### Franchising can help achieve better places by:

- ▶ Putting responsibility for key local roads, and deciding which bus services run, in one place.
- ▶ Giving Local Government the power to decide what sorts of buses must be used – including their emissions standards or technologies.





### Franchising can help achieve better value by:

- ▶ Local Government – accountable to local people – setting all fares.
- ▶ Giving Local Government the central funding for bus services that is currently provided directly to operators.
- ▶ Taking a more strategic view of what services are needed and where and focusing services where they are most needed – rather than where the best commercial opportunity may be.
- ▶ Creating effective competition to run bus services in areas where there is little on-road competition today.
- ▶ Allowing commercial bidders for franchises to innovate.
- ▶ Local Government joining up their planning of local transport services across modes and types of provision (including school and health transport).

## Open data and ticketing



### Open data and ticketing provisions can help achieve better journeys by:

- ▶ Making it easier for passengers to pay for travel across their local area.
- ▶ Providing passengers with better information about the services in their areas to allow more accurate door-to-door journey planning.



### Open data and ticketing provisions can help achieve better places by:

- ▶ Ensuring that anybody developing new ticketing arrangements considers the linkages with other schemes that exist or are being prepared nearby.



### Open data and ticketing provisions can help achieve better value by:

- ▶ Providing passengers with more information about fares so they can make more informed travel choices.

# How will the Bill improve existing types of bus partnerships?

Many successful partnerships operate on a voluntary basis. Others have used the current powers to set up a “Quality Partnership Scheme” where local transport authorities invest in bus-related facilities (such as priority lanes, new bus stops or bus stations) and local bus operators improve the quality of their services in return, often providing new buses. Operators who do not participate cannot use the facilities provided by the authority.

## Improving existing partnership approaches

The Bill:

- ▶ Creates new ‘Advanced Quality Partnerships’ which can be based on “measures” taken by the local authority – such as parking or traffic management policies – as well as, or instead of, facilities provided by the authority, such as bus lanes.
- ▶ Broadens the requirements that can be placed on operators under an Advanced Quality Partnership to include the marketing of the services themselves and of the tickets and fares available to passengers.

## Examples of what can be achieved through partnership working



Passenger numbers increased by 13% in the first year after “**The Star - a new brand of buses**” - was launched between Portsmouth and Waterlooville. The 26 new buses all have a unique livery, depicting a historic Royal Naval vessel. The partnership involves First and two local authorities.



The **Oxford Bus Strategy** led to Stagecoach, Oxford Bus Company and Thames Travel jointly introducing a SmartZone smartcard allowing passengers to travel on any local bus in the Oxford area.

# What is Enhanced Partnership and how will it work?

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The success of any bus partnership arrangements depends on good working relationships between the local authority and bus operators. There needs to be consensus on what needs to be done and a degree of trust that everyone will deliver “their part of the bargain”. No legislation can achieve this on its own. But it can set a legal framework which gives authorities and operators the best possible opportunity to do so. The Bill will create Enhanced Partnerships and Advanced Quality Partnerships.

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## Enhanced Partnership

The Bill will create a new type of partnership, called an ‘Enhanced Partnership’. The core principles are that:



- ▶ The bus market in the partnership area remains commercial.
- ▶ The partnership proposals can cover any geographical area within the boundaries of the relevant local transport authority (or authorities).
- ▶ The partnership proposals must receive majority support from the bus operators who would be affected by the proposals. If they do not, then the proposals cannot be taken forward.
- ▶ The local transport authority will need to work closely with bus operators. The authority will have the legal responsibility for the proposals – but we will expect arrangements to be developed jointly between authorities and operators. Otherwise it is unlikely that the authority will achieve the majority support from operators required.
- ▶ The partnership proposals can set standards that some or all local bus services must meet. These can include the timing or frequency of services, vehicle standards and ticketing products to be accepted.
- ▶ The partnership proposals cannot dictate the price of bus operators’ own tickets or compel them to run services that they do not wish to operate.

## Enhanced Partnership plan and scheme

At the core of the enhanced partnership process is the collaborative development of an Enhanced Partnership plan and scheme.

### Enhanced Partnership plan



Analyse performance of the local bus market.



Sets bus improvements objectives.



Sets the geographical area or areas of application.



Explains how long the proposals will last.

### Enhanced Partnership scheme



Sets out the detailed actions to be taken by the authority and bus operators.



Sets out the route requirements for services in the area, potentially including:



Sets out the operational requirements for services in area, potentially including:

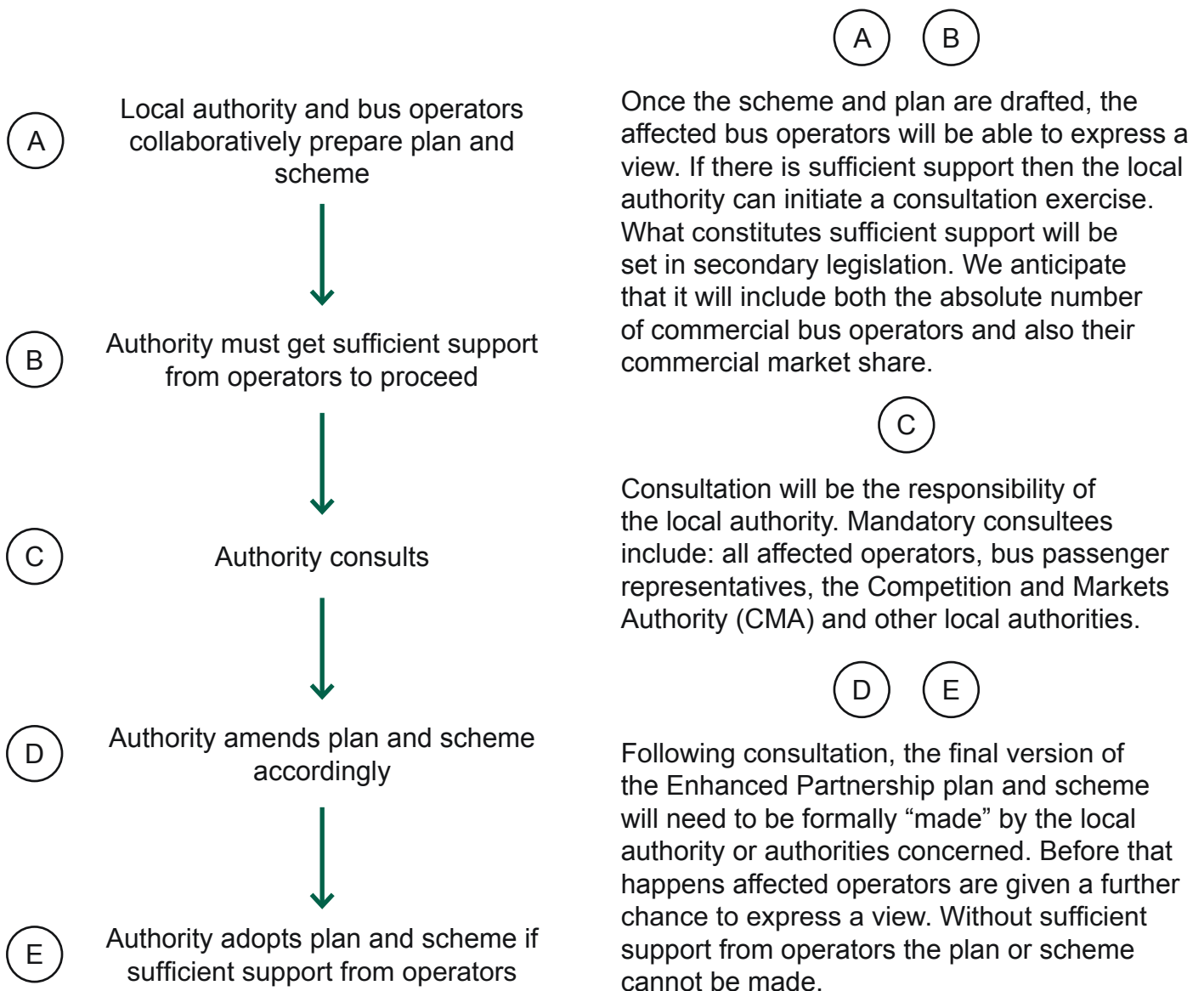
- Frequency of services
- Timetables

- Vehicle specifications
- Branding
- Payment methods
- Ticketing structure
- Real-time information requirements

- ▶ An Enhanced Partnership can cover all, or parts of, the area of a local transport authority. More than one local transport authority can be involved.
- ▶ The Bill requires all commercial operators of local bus services who might be affected by the Enhanced Partnership to be invited to participate and kept informed of progress.
- ▶ How the plan and scheme are developed in practice is decided locally. Some areas might choose to set up working groups between local government and operators – perhaps including an independent or passenger voice.
- ▶ The local authority will have powers to request information from bus operators to assist in developing the plan and scheme and for monitoring and reviewing them once implemented.
- ▶ The scheme can include whatever combination of actions the authority considers appropriate, having involved affected bus operators in its development. One scheme could include only ticketing standards, another branding and vehicle requirements, a third a much wider set of actions.
- ▶ The scheme can set the price of multi-operator tickets, require particular payment methods to be accepted, require tickets to be promoted, accepted or sold in a particular way and set common rules for all tickets sold in the area – such as standard fare zones, validity periods for season tickets and eligibility for concessions. It cannot set the price of single operator tickets.

## Enhanced Partnership process

The way in which Enhanced Partnership proposals will be developed and implemented is summarised in the flow chart below:



## Bus Registration in Enhanced Partnerships



The Bill provides for bus registration powers to transfer from the Traffic Commissioner to the lead local authority for the Enhanced Partnership. All decisions and responsibility will rest with the local authority not the Traffic Commissioner. Where the scheme includes route requirements the lead local authority must take on the registration function. Where the scheme only includes operation requirements, the authority may choose to take on the powers. Responsibility for bus registration would transfer for the entirety of the area affected by the scheme or not at all.

Route requirements will be enforced through acceptance or rejection of registrations. Operation requirements will be attached to registrations. A registration could be refused or cancelled if route or operation requirements are not met. Operators will have the right to appeal a decision to the Traffic Commissioner (if a local authority has taken the decision) or to the Upper Tribunal (if a Traffic Commissioner has taken the decision).

# What is bus franchising and how will it work?

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Franchising is based on the model for providing bus services in London – which are procured by Transport for London. The authority determines and specifies the bus services to be provided in an area, and bus operators bid to provide the services. It is also similar to rail, where national or local government specify most services and commercial operators run them.

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## Bus franchising



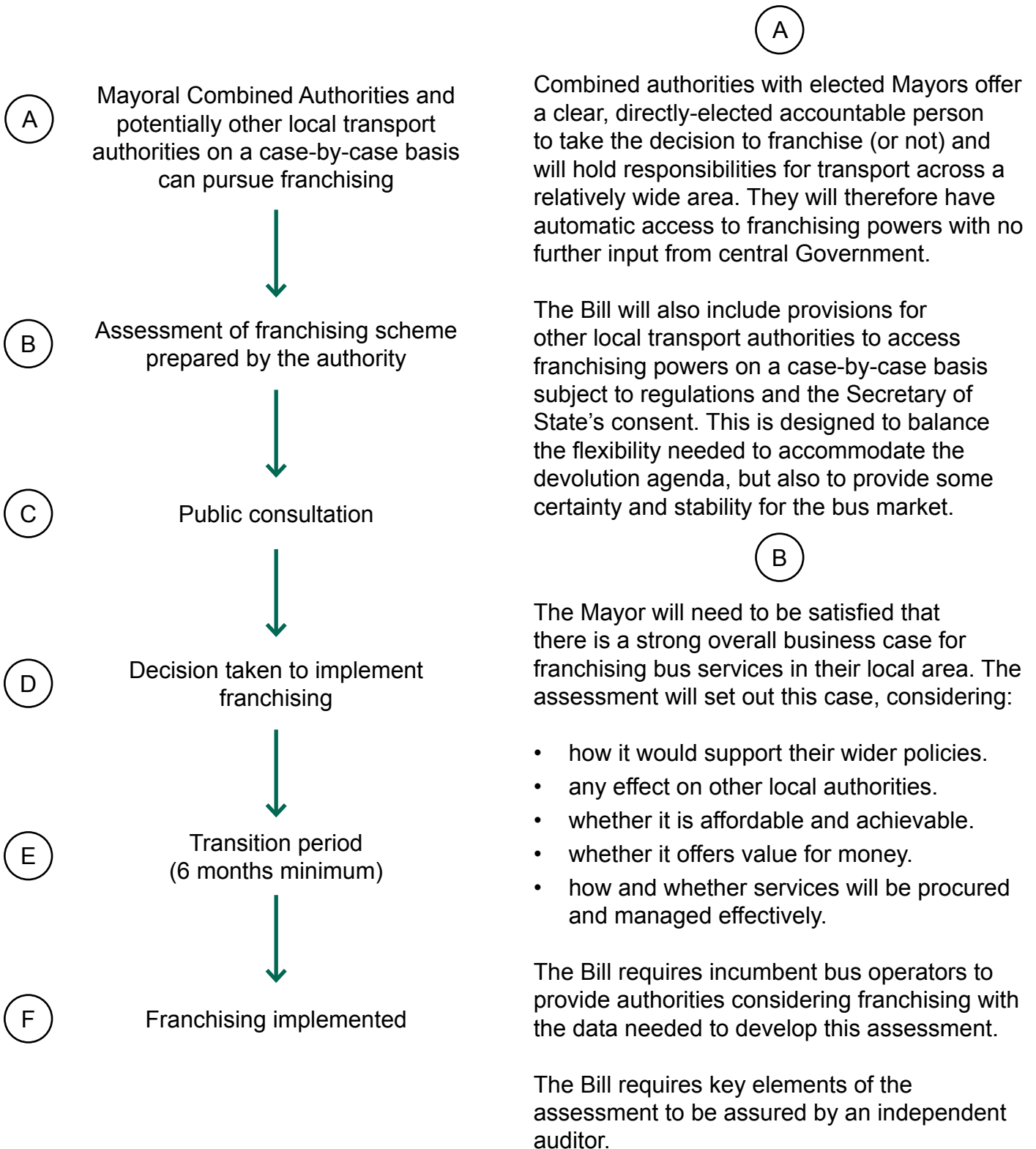
The core principles of our bus franchising policy are that:

- ▶ Franchising powers should only be available to authorities, other than Mayoral Combined Authorities, where the capability and track-record of the authority concerned is sufficiently strong and where there is an appropriate economic geography.
- ▶ A local decision needs to be taken as to whether or not to use the franchising powers, with clear accountability at the local level.
- ▶ Local decisions to implement franchising should not be second-guessed by central government or an independent body.
- ▶ Local decisions to move to franchising need to be based on robust evidence and analysis, with the needs of passengers, including those who travel into and out of franchising areas, firmly in mind.
- ▶ Franchising will give the local authority the ability to take control of, and responsibility for, the local bus services in the area.
- ▶ Bus services should continue to be provided by commercial operators, not local authorities. Local authorities will, in future, not be able to set up new municipal bus companies.
- ▶ Plans to implement franchising must take account of the needs of small and medium sized operators.
- ▶ Non-commercial community transport operators will not be affected by franchising.



## Bus franchising process

The way in which franchising proposals will be developed and implemented is summarised in the flow chart below:





C

The consultation document should set out the area franchising will apply to, the services included and how the procurement process will operate (including consideration of how to ensure small and medium sized operators can participate). Franchising authorities will be required to consider impacts on neighbouring areas. Mandatory consultees include operators who may be affected, passenger representatives and other local authorities.

D

A decision will be taken in the round, and authorities may take their own judgements as to the weight to be applied to each of the elements of their assessment. There is no requirement to “pass” all of the aspects of the assessment.

E

Once the decision to franchise has been taken, the Bill will enable authorities to double the notice period that must be given before operators can cancel or amend bus services. This is to help deliver stable services for passengers

Also, to give incumbent operators and any new entrants time to adapt and plan for the change, the Bill requires at least a six month transition period between the tender results for the new franchise being announced and its implementation in practice.

F

The Bill provides that the Transfer of Undertakings Protection of Employment Regulations (TUPE) will apply where franchising is implemented. Staff transferred under TUPE will be offered a “broadly comparable” pension scheme.

## Service permits

The Bill will allow commercial services which are not part of a franchise to operate in a franchising area if they are “permitted” to do so by the franchising authority. Service permits should be granted if the proposed service would benefit passengers and not adversely affect franchised services.

This will apply particularly to cross-boundary services, where a service has its origin or destination outside of the franchised area. Permits could also be used to enable ‘open access’ – allowing commercial operators to fill any gaps that exist in the franchised network.

Authorities will be able to attach certain conditions to the issuing of a permit, such as ticket types that must be accepted. The Bill requires the franchising authority to set out the conditions that they intend to attach in certain circumstances. Operators will be able to appeal to a Traffic Commissioner against a decision not to grant them a service permit.



# How will the Bill improve information for passengers?

Information about local bus services varies hugely across England. At its best – such as in London – passengers have real-time information, accurate fares and timetables at their fingertips. But this is not the case everywhere. Research by Transport Focus found that passengers want more centralised information about bus times, routes and fares.

## Open data

The Bill includes powers to make regulations regarding the release of open data on routes, timetables, punctuality and fares, including its format. All operators of local bus services will be required to release the requested information. In franchising areas the responsibility will lie with the franchising authority.

We intend to phase in these requirements, with registration data being required in 2017, and fares and punctuality data being added in stages by 2020. This transitional approach should make the process of releasing data easier for operators to manage.

### Situation now

National dataset for route and timetable information held by Traveline – much data taken from paper-based system, not always accurate.

Fares information hard to find in advance – no national dataset for bus fares.

9 out of 10 buses have equipment fitted to generate real-time data – but data not available to passengers<sup>16</sup>.

### Future opportunity

Open data means new opportunities for tech companies and app developers.

Accurate door-to-door journey planning across England.

Managed “assisted digital” service for smaller operators.

## Recent successes

The Arriva Bus App was the first fully national real-time bus app and, since its launch in June 2014, has had 750,000 downloads. The app has a full trip planner and provides access to timetables, fares and real-time information for every individual bus route operated by Arriva.

The real-time data is freely available to local authorities and other stakeholders.



# How will the Bill make paying for travel easier?

Buses outside London have equipment to accept smart tickets, and major operators have committed to all buses accepting contactless payment by 2022. But the vast majority of bus fares are still paid in cash – and some operators still require the right change.

## Making bus services easier to use

Improving these arrangements won't just make payment easier for passengers, it can also:

- make journeys across modes easier – by increasing the take up of multi-modal tickets.
- speed up bus journey times. It takes much longer for passengers paying by cash, rather than contactless, to get on a bus.

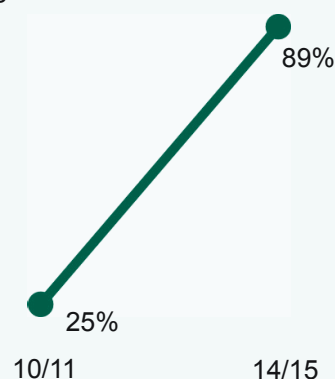
The Bill gives local authorities a range of new tools to make buying a ticket and paying for bus services easier for passengers. All of the new proposals, including the new partnership and franchising proposals, will help contribute to this.

The Bill also updates existing powers to establish multi-operator and multi-modal ticketing schemes so that it is clear they can also specify the technology to be accepted. And it ensures that anybody developing new ticketing arrangements thinks about what other schemes exist or are being prepared nearby.

The table below summarises what can and cannot be done under the new powers.

### Smart ticketing enabled buses

Percentage of buses fitted in England outside London

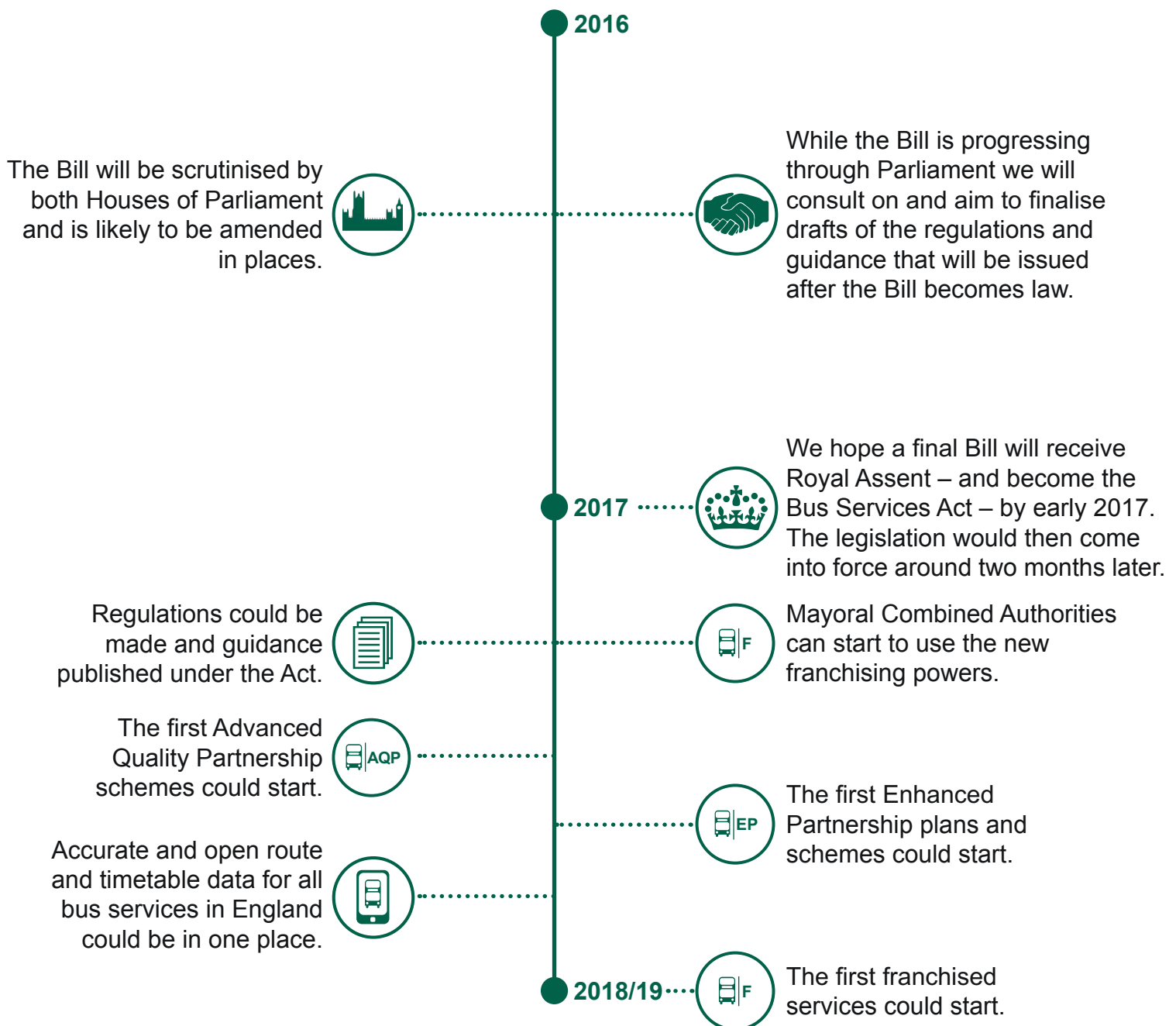


Can a requirement be put on bus operators to:	Ticketing schemes	Advanced Quality Partnership	Enhanced Partnership	Franchising
Sell and accept a multi-operator or multi-modal ticket (including in a specific format, such as on a smart card)?	✓	✓	✓	✓
Market particular tickets in a certain way (including promoting multi-operator tickets not just their own tickets)?	✗	✓	✓	✓
Set all their tickets and fares on a standard set of "zones" that apply to all operators?	✗	✗	✓	✓
Follow common ticket rules for their own tickets (such as a standard length of "period" tickets or age to qualify for a youth concession if offered)?	✗	✗	✓	✓
Sell or accept any type of ticket on a particular technology (such as a smart card)?	✗	✓	✓	✓
Charge a set price for a multi-operator ticket?	✗	✗	✓	✓
Charge a set price for their own, single-operator tickets?	✗	✗	✗	✓

# What happens next?

We would encourage local authorities and bus operators to start thinking now about whether and how they could use any of the new powers in the Bill – assuming that they become law following scrutiny by Parliament – to improve bus services for passengers, support their local economy and grow the overall bus market.

The timeline below sets out our best view of what is likely to happen over the next two years.



# Sources and acknowledgements

## Sources

1. In 2014, in England, the average number of local bus trips was 59 and the average number of public transport trips was 94. This made local bus trips 63% of all public transport trips. National Travel Survey, Department for Transport, September 2015, Table NTS0303.
2. In 2014/15, the number of local bus passenger journeys made in England was 4.65 billion. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103.
3. In 2004/05, the number of local bus passenger journeys made in England outside London was 2.25 billion and in 2014/15 was 2.28 billion, an increase of 1.7%. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103.
4. In 2004/05, the number of local bus passenger journeys made in metropolitan areas was 1.07 billion and in 2014/15 was 1.00 billion, a decrease of 6.7%. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103.
5. In 2004/05, the number of local bus passenger journeys made in non-metropolitan areas was 1.18 billion and in 2014/15 was 1.29 billion, an increase of 9.3%. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103.
6. In 2014/15, there were 158 local bus passenger journeys per head in Brighton and Hove and 153 local bus passenger journeys per head in Nottingham. The average for England outside London was 50 local bus passenger journeys. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103 and Table BUS0110.
7. In 2004/05, the number of local bus passenger journeys made in London was 1.80 billion and in 2014/15 was 2.36 billion, an increase of 31.1%. Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0103.
8. Bus reform workshops took place in five locations across England in September and October 2015.
9. The Bus Passenger Survey was conducted in 24 authority areas in England. Overall 86% of passengers were satisfied with their service. Bus Passenger Survey Autumn 2015, Transport Focus, March 2016, page 3.
10. Transport Focus conducted research into top priorities for improvements for bus users. Bus passengers have their say, Transport Focus, March 2016, page 23.
11. Based on statistics from National Travel Survey.
12. The Case for the Urban Bus, Urban Transport Group, February 2013, page 1.
13. The Case for the Urban Bus, Urban Transport Group, February 2013, page 28.
14. The CTA State of the Sector Report for England, Community Transport Association UK, 2012, page 4.
15. Innovation already leading to success: (a) Source given in footnote 9 (b) Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0603 (d) Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0604 (e) Public Service Vehicle Survey, Department for Transport, September 2015, Table BUS0607
16. Source given in footnote 15(e).

## Image acknowledgements

Stagecoach UK Bus and First Group (page 10), and Arriva (page 17).



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