Strathclyde Regional Bus Strategy
Case for Change

Strathclyde Partnership for Transport

EXECUTIVE SUMMARY

Background

This Case for Change sets out **why change in the bus network in Strathclyde is required**.

It's foundations are embedded in **A Call to Action: The Regional Transport Strategy (RTS) for the west of Scotland (2023 – 38)**[1], and the RTS's vision, priorities and objectives, and clear policy statement setting out the aim for **a world class passenger focused public transport system.**

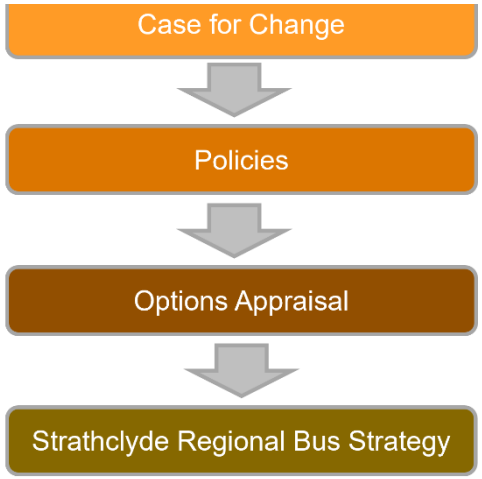


Figure 1: SRBS Development Process

The Case for Change is the first stage in the development of a Strathclyde Regional Bus Strategy (SRBS). It defines a set of objectives, and from these a set of core policies will be developed to frame the strategy and inform the appraisal of options which will ultimately determine the strategy and its delivery (as shown in Figure 1).

The RTS was published in 2023, and reinforces national policy ambitions, setting out the following Vision for transport in the region:

The west of Scotland will be an attractive, resilient and well-connected place with active, liveable communities and accessible, vibrant centres facilitated by high quality, sustainable and low carbon transport shaped by the needs of all.

The RTS recognises the need to invest in transformative public transport ensuring a sufficiently attractive 'offer' to move more people by more sustainable transport modes rather than by car. Therefore a key theme within the strategy encompasses *enhancing the quality and integration of public transport* with a specific objective *to make public transport a desirable and convenient travel choice for everyone.*

The RTS concluded that **the strategy Vision will not be achieved without improving the quality and integration of the bus network and set out a policy aiming for a world class passenger focused public transport system**. Given this conclusion, the need for the development of a Strathclyde Regional Bus Strategy was recognised with the new powers and opportunities available through the Transport (Scotland) Act 2019 requiring consideration in the development of the SRBS. In this regard, a previous scoping study[2] (undertaken as a supporting workstream during the RTS development and to help develop the relevant RTS policies) considered the new powers and bus improvement options available to local transport authorities under the Transport (Scotland) Act 2019.

The development of the world class system is guided by the RTS Connecting Places Policy theme which focuses on the spatial context for the RTS, setting out the strategic gateways, corridors and locations that will be a focus for future transport appraisal and investment to support regional development priorities, economic strategies and the Growth Deals[3].

The bus network in the SPT region – recent trends

The vision for public transport in the region forms part of a rich local, regional and national policy context. As well as being underpinned by the national transport strategy, **bus has a catalytic role to play in the successful delivery of a range of national, regional and local policy,** supporting social inclusion, carbon reduction and energy, economic and local environmental objectives and outcomes. In particular, the multi-billion Clyde Metro project will have major impacts on the way public transport interacts across Glasgow and the wider area and its success requires an increasing need for deeper integration of public transport services and fares, currently not easily provided through the existing commercial bus delivery model.

Despite this major role for bus in the successful delivery of a range of policies, the bus network in the region has been on a downward trajectory since most recently peaking in 2008/9[4]. Bus passenger journeys (as shown in Figure 2) and bus vehicle kilometres operated across the region have been steadily falling, with this

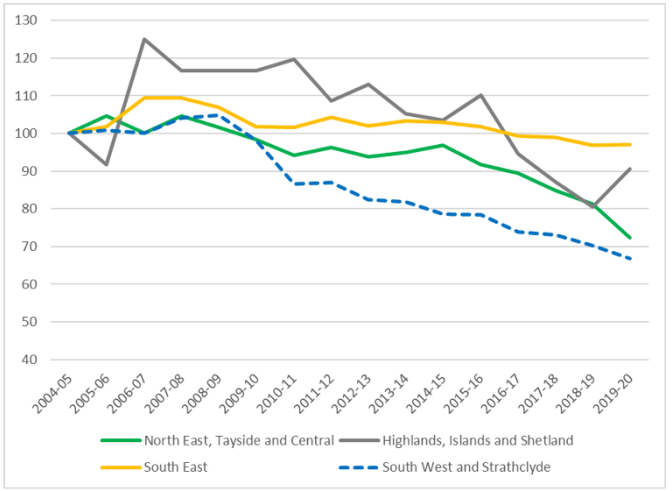


Figure 2: Annual Passenger Journeys (2004/5 – 2019/20) – indexed to 2004/5 = 100

[1] Regional Transport Strategy | SPT | Strathclyde Partnership for Transport

[2] Glasgow & Strathclyde Transport Act Scoping Study, Options Assessment Report

[3] Home | Ayrshire Growth Deal, glasgowcityregion.co.uk, Rural Growth Deal | Argyll and Bute Council (argyll-bute.gov.uk)

[4] Scottish Transport Statistics

decline not mirrored across other transport modes. Bus is the only transport mode to see long term decline this century and this decline in the west of Scotland has been greater than in other Scottish regions. Passenger satisfaction has also fallen.

In summary, bus can help achieve improved social, environmental and economic outcomes, but the sustained decline in bus use is limiting its role in supporting wider policy.

Current Bus Network and Services

The 2023 bus network extends across the region, with greater service frequencies on strategic corridors into Glasgow and between main settlements.

The bus network is a mixture of commercial and subsidised services. Between 2019 and 2023, there has been a decrease in the range and extent of the commercial bus network over time, with a marked increase in subsidised services over the same time period. The COVID-19 pandemic had a range of temporary and medium-term impacts on travel behaviour, which have exacerbated both passenger and network decline. At the Scotland-wide level, the public money spent per passenger carried (in real terms) increased by 40% between 2006/7 and 2019/20 (pre-pandemic), covering all forms of public support (e.g., grants, concessionary fares reimbursement etc.).[5]

Consideration of the accessibility of the network highlights that: 22% of households across the SPT area do not have access to a bus stop (within a suitable walking catchment); 40% of households (defined as having access to a bus stop) have a bus less often than every 30 minutes, with this rising to 65% for stops located outside of Glasgow; 43% of households outside of Glasgow have no direct bus to Glasgow in the afternoon, increasing to 46% in the evening; nearly a quarter of households (23%) have no access to a service after 7pm (rising to 36% outside of Glasgow); and nearly 1 in 3 households (31%) are not served by a Sunday service. This limits the use of the bus network by many including for employment, education, leisure and social activities.

Overall, the commercially operated bus network is reducing - requiring increased public intervention. The existing network limits its use both by those with no access to the network, and through limited evening and Sunday services.

Delay and its impacts

Increasing urban congestion is a problem facing bus operators in Strathclyde, and a particular issue for those operating within Glasgow. While drivers of vehicles which don't have to follow a fixed route can utilise real time data apps to seek out alternative routes to avoid congested areas, bus operators have no such choice. Analysis shows that bus journey times across most of the region are far longer than those by car.

Previous research showed that Glasgow had experienced some of the worst average bus journey times increases per annum compared to other UK cities, with this delay impacting operating speeds and costs, leading to longer journey times, higher fares and ultimately fewer passengers. It is worth noting that in Scotland, between 2004/5 and 2021/22, whilst bus fares increased by 88%, this largely reflected increasing operating costs per bus-kilometre which increased by 98% (both in current prices). Reflecting the reduction in passenger numbers, the operating cost per passenger increased by 215% over this period (in current prices).[6]

Congestion affects bus operating costs and journey times, which can contribute to higher fares and making bus less attractive to passengers.

Fare and Tickets

The relative cost of travel by bus has risen more than other modes and the cost has risen significantly more than the Retail Price Index over a more than 20-year period. Furthermore, concessionary travel (providing free bus travel for disabled people plus anyone over 60, as well as for anyone under 22) on the Scottish network is increasing, with concessionary fares passengers as a percentage of all passengers on the bus network at a current high of 38%. Furthermore it is estimated that approximately 49% of Scottish concessionary travel journeys are undertaken in Strathclyde (equivalent to circa 68 million journeys in 2019/2020)[7]. The fact that operator reimbursement for concessionary travel is based on a fixed percentage of the average single adult fare foregone for the journeys made, may distort market forces which would otherwise link the level of adult fares with total demand.

With approximately 40 operators providing services across the region, the structure of fare products is complex with users needing to select from single and multi-operator products covering a range of different geographical areas as defined by individual operators. This array of ticketing and zoning creates a highly complex structure for the bus user to navigate adding difficulty to determining the best value for money for their trip.

The relative cost of travel by bus has risen more than other modes, with a lack of fares integration, and ticketing complexity.

[5] Scottish Transport Statistics, Tables 2.2a and 2.9
[6] Scottish Transport Statistics, Tables 2.5, 2.6 and 2.7
[7] Glasgow & Strathclyde Transport Act Scoping Study, Affordability of Public Transport, SYSTRA

Competition

While there are approximately 40 operators providing services within the region, three main operators operate over 80% of all bus mileage: First (41%), Stagecoach (19%) and McGills (21%), and most local authorities have a dominant operator, with 63% of bus stops served by a single operator.

The deregulated market was set up to promote competition and ensure greater passenger choice, but there is a lack of competition across much of the region.

Current Delivery Model and Funding

Bus services were deregulated across the UK in 1986 by the Transport Act of 1985. Existing bus companies (predominantly municipally or nationally controlled) became open to competition, provided they could satisfy some basic operational and safety requirements and obtain an operating licence, and over time the publicly-owned companies were privatised after which there was a period of consolidation into the three dominant operators today. The majority of bus services in the region are provided on a commercial basis (90% of all vehicle kilometres) by privately owned bus companies who recover the cost of operating their services through a mixture of farebox revenues and government payments (concessionary fares reimbursements and grant support).

The network is ultimately governed by the **Traffic Commissioner of Scotland** who licenses the operators and with whom all services must be registered after meeting certain minimum criteria. The Commissioner also sets minimum vehicle standards and has the powers to suspend or revoke licences if terms are broken. Local Authorities themselves therefore have no powers or control to govern the operators or services available within their authorities other than through the provision of socially necessary services. As the regional transport partnership, **SPT** is responsible for the delivery of the Regional Transport Strategy, for maintaining bus stops and shelters and owning and operating some bus stations and Park & Ride facilities in the region. By agreement with their constituent authorities, they are responsible for the delivery of supported (subsidised) bus services (which cannot compete with commercial services) as well as MyBus and school transport on behalf of local authorities. SPT also operates and maintains the Glasgow Subway and is responsible for the management of the ZoneCard. While SPT cannot stipulate the bus network operating across the region, they actively engage with operators through voluntary partnership arrangements and work with local authorities to identify and contract the delivery of socially necessary supported services, and in some areas these tendered (subsidised) services can form a significant proportion of the bus services available.

Under the current bus network delivery model, only bus and coach operators have the powers to plan and design their respective bus networks whereas SPT is only able to plan socially necessary bus services.

Summary

The analysis highlights that while travel by bus needs to increase, bus services and patronage have steadily been in decline over the last decade. Across the bus network in the region:

- Some markets are not served at all, or served poorly
- There is little true competition in terms of services and fares in many parts of the region
- There is increasing network delay and congestion which is impacting on the attractiveness of the network and eroding passenger confidence and perceptions of travel by bus

For passengers, the current deregulated model means:

- Fares and ticketing can be complex and more expensive with little integration
- Bus services are run based on commercial reasons meaning some areas are better served than others. Consequently, wider economic, social and environmental benefits are limited where it would be economically efficient to increase supply above the levels determined by the commercial market
- Customer standards can vary given the number of service providers
- A loss in passenger confidence due to instability in the bus network (due to reduced services, changes in routes, poor reliability etc.) is evident
- There is competition between public transport modes rather than integration

In terms of present operation, the current deregulated model operating across the region (and indeed throughout Scotland) means that SPT and its local authority partners:

- Cannot easily provide a truly integrated transport network
- Cannot effectively and efficiently coordinate long-term transport strategy that supports the RTS vision
- Has very limited control over the routes operated, service frequencies, fares charged or tickets sold by operators
- Needs to provide increasing public sector funding to support socially necessary services to fill gaps in provision

Strategy Vision, Objectives and Outcomes

The above **points towards a need for change in the delivery of bus operations across the region** and overall bus reform to start closing the gap between existing operations and a world class bus network.

Given this, the key aim for the SRBS has been set as:

To provide a world class bus network which reverses the long-term decline in travel by bus, by developing a more efficient bus system which is fully integrated with other public transport, affordable to all and plays a key role in the social, environmental and economic development of the region.

This key aim flows into three strategy objectives as shown opposite, which in turn support the fundamental transport behaviour outcome for the strategy – **to get more people to choose travel by bus and that more people can use the bus to meet their everyday travel needs**. Achieving this would in turn provide a wide variety of benefits to society, which would align to policies around decarbonisation, inclusion and the widening of opportunities, economic growth and placemaking.

To express how the three objectives can be met, and help shape the development of options to be appraised, three core **policy areas** will flow from the objectives, as shown in Figure 3, focussed around:

- **Level of Service** – considering how, where and when the bus network operates, including hours of operation, service frequencies, and the connectivity of the bus network in terms of providing more people with access to bus services
- **Affordability** – considering ambitions related to the affordability of travel by bus across the region, including factors such as the structure, legibility, and integration of fares
- **Service Quality** – focussing on other important aspects that allow the delivery of a world-class bus service, including areas, such as interchanges and bus stops, information, ticketing, vehicle and driver standards, and service reliability and punctuality

These policies will set out in more detail SPT's aspirations for a world class bus network and its relationship with other modes of transport across the region, and they will be developed at the start of the next task, Options Appraisal.

The Options Appraisal will assess, based on an approach which is compliant with the Scottish Transport Appraisal Guidance (STAG), how well the current model plus alternative delivery models can deliver these policies and hence the objectives and vision, together with the associated costs and therefore the value for money.

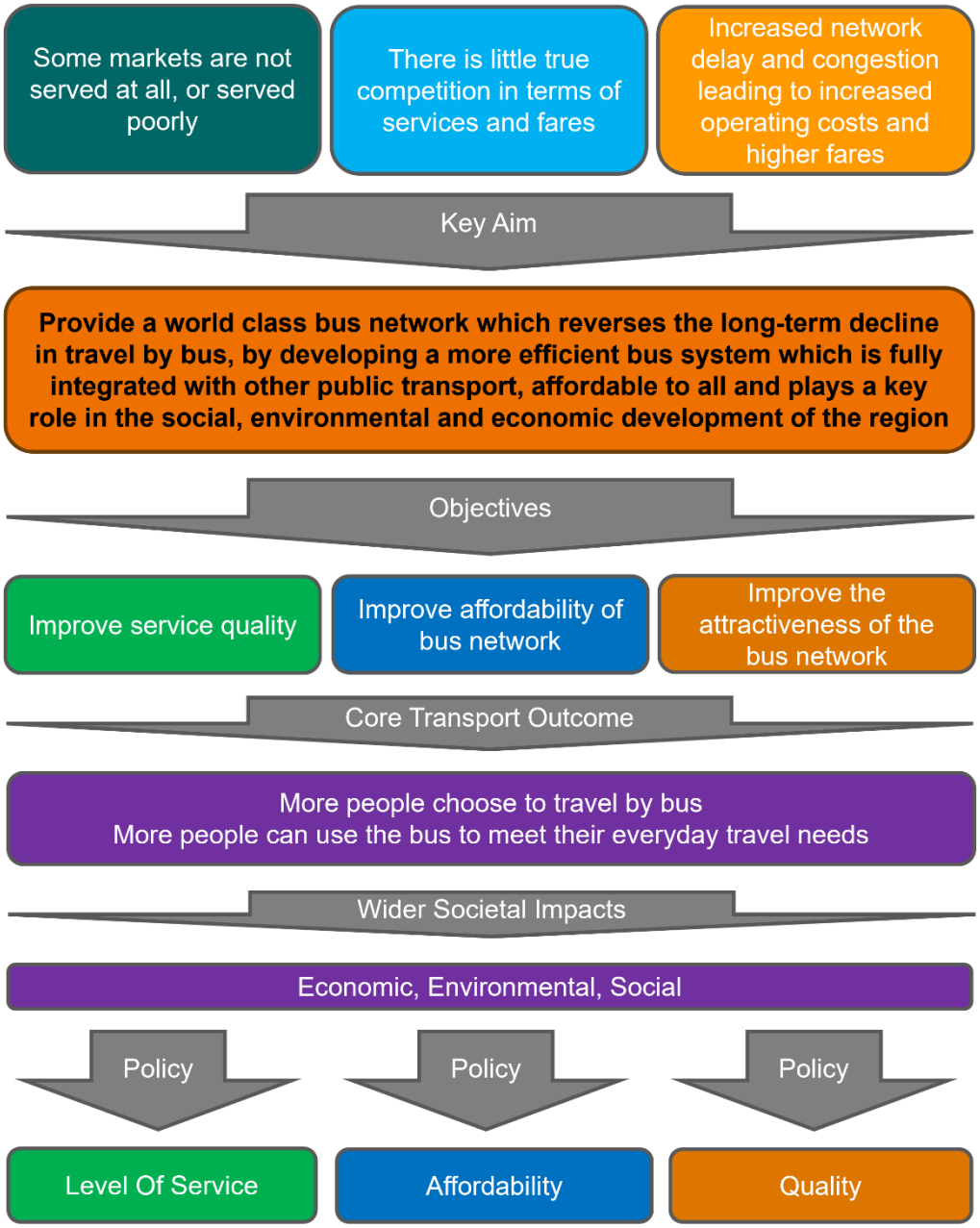


Figure 3: Problems to Policies

INTRODUCTION

This Case for Change sets out why change in the bus network in Strathclyde is required. It provides a clear statement as to why the status quo, in terms of the network of services currently provided, its quality and the cost to the user are not delivering for the residents, economy and environment of the Strathclyde region in terms of a range of national and regional policy objectives.

The foundations of this Case for Change are embedded in **A Call to Action: The Regional Transport Strategy (RTS) for the west of Scotland (2023 – 38)**, and the RTS's vision, priorities and objectives, and clear policy statement setting out the aim for **a world class passenger focused public transport system.**

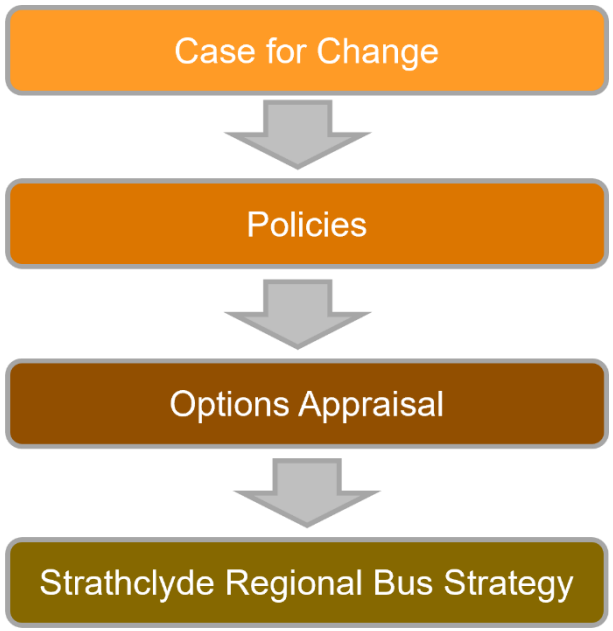


Figure 4: SRBS Development Process

The Case for Change is the first step towards the development of a Strathclyde Regional Bus Strategy (SRBS), with the Case for Change defining objectives from which a set of core policies flow to frame the strategy and inform the appraisal of options to determine the strategy and its delivery.

The sections which follow set out the conclusions of the RTS and take a deeper dive into the issues raised, exploring trends in the Strathclyde bus network considering both supply and demand, and reflecting on how the existing bus network is shaped by the current 'model' under which services are delivered.

The Case for Change concludes by setting out the key aim for the **Strathclyde Regional Bus Strategy** (SRBS) and from this a set of core objectives. These objectives form the basis of a set of Policies around which the SRBS will be developed.

THE VISION FOR PUBLIC TRANSPORT IN THE REGION

The **RTS** was published in 2023 and sets out the following Vision for transport in the region:

The west of Scotland will be an attractive, resilient and well-connected place with active, liveable communities and accessible, vibrant centres facilitated by high quality, sustainable and low carbon transport shaped by the needs of all.

The RTS reinforces national policy ambitions, reflecting Scotland's *National Transport Strategy 2* (NTS2)[8] published in 2020, and the revised climate change targets published by the Scottish Government in the updated *Climate Change Plan (CPPu)*[9]. The latter of these documents sets out a number of key national targets of particular relevance to this strategy, including to:

- reduce car kilometres by 20% by 2030
- ensure the majority of new buses purchased from 2024 are zero-emission
- phase out the need for new petrol and diesel vehicles by 2030

The Scottish Government's route map to achieving these targets is set out in the *Reducing car use for a healthier, fairer and greener Scotland* (2022) publication which outlines investing in the public transport network as a key part of the path to achieving the 20% reduction in car kilometres sought by 2030.

At its core, the RTS signals the need for transformational change in transport and travel behaviour. The strategy recognises the heightened urgency of the climate emergency, the long-term impacts of the COVID-19 pandemic, and the ongoing cost of living crisis. Given the urgency to address these impacts, the RTS is a clear '*Call to Action*', with a focus on ensuring that everyone can use the transport network by making it accessible, affordable, available and safe for all.

In seeking to deliver its vision, the RTS sets out three Priorities to anchor the strategy within the wider societal goals transport needs to help achieve:

- a healthier environment
- inclusive economic growth
- an improved quality of life

[8] National Transport Strategy 2 | Transport Scotland

[9] Securing a green recovery on a path to net zero: climate change plan 2018–2032 - update - gov.scot (www.gov.scot)

From these priorities, five transport objectives were set (as shown in Figure 5) covering accessing and using transport, transport emissions, quality and integration of public transport, enabling active travel and improving strategic connectivity.

The RTS recognises the need to invest in transformative public transport ensuring a sufficiently attractive 'offer' to move more people by more sustainable transport modes rather than by car and a key theme within the strategy encompasses *enhancing the quality and integration of public transport*. This theme recognises that satisfaction with the public transport system in the region has been decreasing, and passengers' perceived value for money from public transport is lower in the region than in other regions in Scotland. Emphasised problems within the RTS included reliability and frequency of services, and poor integration of services, networks, information and ticketing. Improvements are therefore needed such that public transport is easier to use for everyone, and to achieve a shift from less sustainable transport to public transport.

The RTS has a specific objective *to make public transport a desirable and convenient travel choice for everyone*, however, the other four RTS objectives are all pertinent to the specific public transport objective.

The RTS recognises that the more people who use public transport, the greater the economic and environmental benefits and that a good public transport system is critical to achieving a more inclusive economy and reducing health inequalities by ensuring fairer access for people who do not have a car.

The RTS Vision will not be achieved without improving the quality and integration of the bus network, and sets out a policy aiming for a world class passenger focused public transport system.

Given this conclusion (as highlighted in Figure 5), the RTS recognised the need for the development of the SRBS and noted the new powers and opportunities available through the Transport (Scotland) Act 2019 that require consideration in the development of the SRBS.

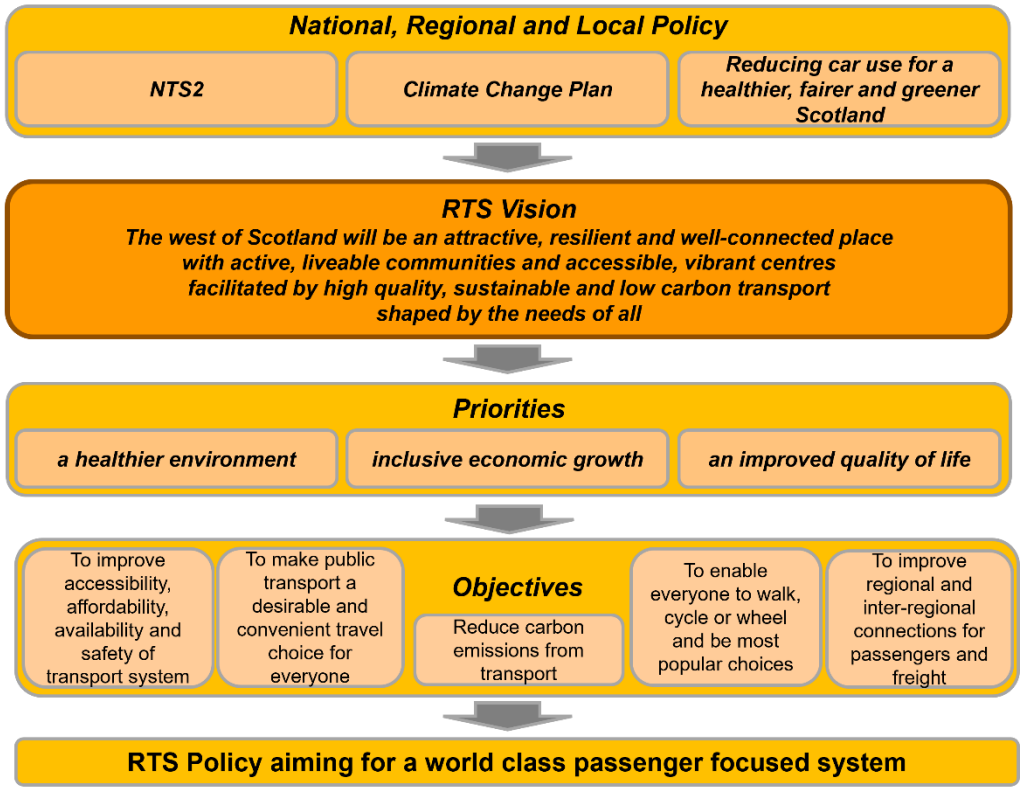


Figure 5: RTS Vision, Priorities and Objectives

Realising the RTS Vision and Objectives

Previously in 2021, SPT and Glasgow City Council commissioned a scoping study[10] to consider the new powers and bus improvement options available to local transport authorities under the Transport (Scotland) Act 2019.

The study (undertaken as a supporting workstream during the RTS development and to help develop the relevant RTS policies) recommended that, to resonate with the Glasgow City Council desire to have a dynamic world class city and reflect the regional and national ambitions, partners delivering all aspects of bus services within the region should **commit to a world class bus network for Glasgow & Strathclyde**. The features and desired outcomes of such a network are set out in Figure 6.

[10] Glasgow & Strathclyde Transport Act Scoping Study, Options Assessment Report

The role of bus in supporting wider policy

Policy Overview

The development of the RTS recognises the vision for public transport in the region forms part of a rich wider local, regional and national policy context (as highlighted in Figure 6). The RTS supports the wider aims and objectives for the region, often acting as a core catalyst to their delivery. In this regard, bus has an important role in the successful delivery of both transport policy and wider social, environmental and economic policy.

Other policies (set out in the figure below) where bus has a clear role in supporting their successful delivery include, regionally, the Regional Spatial Strategies, Regional City / Growth Deals, Regional Economic Strategies, Climate Adaptation Strategy, and Glasgow and the local authorities' Local Transport Plans, Local Development Plans, and Local / Outcome Improvement Plans.

National

The key national policy documents noted in Figure 6, as well as the Scottish Government's *Programme for Government (2023-24),* represent some of the national policy this strategy seeks to support and within which bus has a major and multi-faceted role in ensuring successful delivery. NPF4 notes the priority for the Scottish Central region that the delivery of sustainable places**,** Regional Spatial Strategies and Local Development Plans in this area should support net zero energy solutions including improved low carbon transport.

The Scottish Government's Programme for Government (PfG) (2023-24), published in September 2023, states the bold and ambitious actions on net zero in the transport sector, including supporting operators *to change the market for zero emission bus travel through our Scottish Zero Emission Bus Challenge Fund* (with further details on this below). The PfG delivery plan for 2023 includes *laying secondary legislation before the end of this year, to enable bus franchising and partnership options to be developed, providing even more powers to Councils*.

The Scottish Government's *Cleaner Air for Scotland 2* publication noted above sets out an air quality policy framework for the next five years and a series of actions to deliver further air quality improvements. The framework notes NTS2's recognition that Scotland's current transport system is a significant contributor to poor air quality, and that there is a need to reduce vehicle journeys, and reduce the need to travel unsustainably and accelerate sustainable modal shift. Indeed, the framework states that ***buses are arguably the single most important mode for reducing transport-related air pollution*** *due to their central role in reducing congestion, improving*

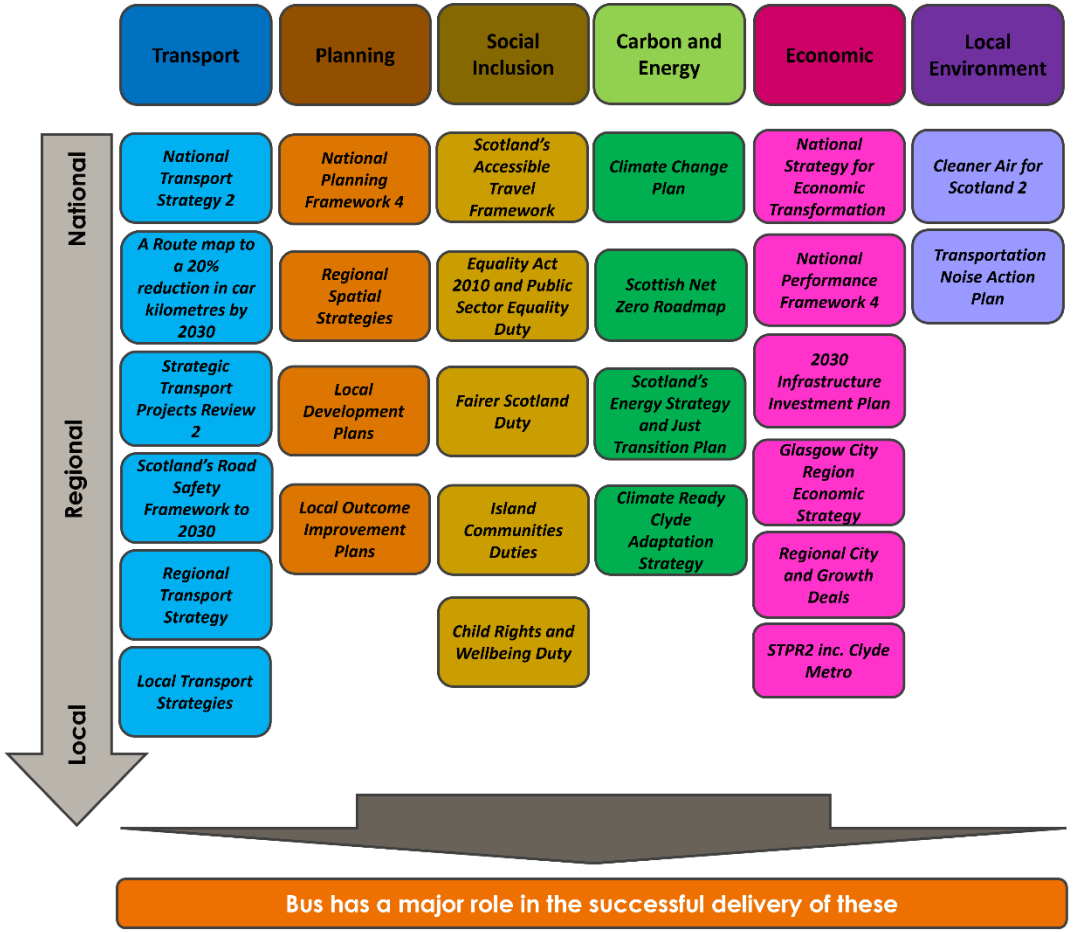


Figure 6: National, Regional and Local policy

journey time reliability, and as a key component of future Mobility as a Service (MaaS) solutions.

Carbon Emissions

It is worth noting that significant progress in decarbonising Scotland's bus fleet is already underway. The Scottish Zero Emission Bus challenge fund (ScotZEB[11]) opened to applications in 2021 with the aim to support swift and significant change in the bus market in favour of zero-emission technologies. By supporting the swift

[11] Scottish Zero Emission Bus challenge fund | Transport Scotland

transition to zero emission vehicles and infrastructure, the fund is helping to achieve targets to reduce greenhouse gas emissions, contribute to the delivery of Low Emission Zones, and encourage inward investment and growth in the supply chain of zero carbon vehicles. Phase 1 of the funds saw over £62milion awarded to decarbonise buses. Of this funding, significant awards were made to several operators in the SPT area including First, Stagecoach, and McGills. First were awarded a combined £18.6million to deliver 74 new electric vehicles across Glasgow and Aberdeen, with 50 of these to operate from First's Scotstoun depot in Glasgow. First are also investing a further £16.4m to further increase its zero-emission fleet. This will take the number of electric buses operated by First in Glasgow to 200. Given this, over 40% of First's vehicles operating out of Glasgow's Caledonia and Scotstoun depots will be fully electric and zero-emission by Spring 2024[12]. Stagecoach was awarded just over £8.0million towards 39 buses being deployed across Scotland with 15 operating on services in Kilmarnock[13]. McGills were awarded £9.1million towards 41 buses, bringing the total number of electric buses in the McGill's fleet to 109, with investment being made at McGills Greenock, Inchinnan and Johnstone depots to support this[14].

Phase 2 of the ScotZEB funding will see a further £58million awarded and available for drawdown during 2023/24 through to 2025/26. The fund closed for Phase 2 applications in September 2023, with funding as yet unawarded at the time of writing, and with an application made by SPT[15].

Furthermore, in August 2022, Scotland's Bus Decarbonisation Taskforce published its pathway to a zero-carbon bus sector, with the Scottish Government launching a £500,000 scheme to support its delivery, focusing on supporting smaller operators and local authorities – including community and school transport providers. The Zero Emission Bus Market Transition Scheme, delivered through the Energy Saving Trust recognised that most progress had been made to date by the largest public service bus operators, with progress required to make sure smaller operators, and those delivering essential services such as home to school transport, were supported to make the change. The fund therefore supported small and medium sized bus operators, local authorities and community transport organisations to assess their options for decarbonisation, and prepare collaborative and competitive business cases ahead of Phase 2 of ScotZEB.

Advancing equality and tackling inequalities

A range of impact assessments are being carried out for the SRBS process including a **Public Sector Equality Duty**, **Fairer Scotland Duty**, **Island Communities Duties** and **Child Rights and Wellbeing Duty**. The scoping stage for these impact assessments has identified key evidence for the Case for Change.

It is recognised that **people with protected characteristics are more likely to use and rely on public transport, particularly bus services and therefore limited or lacking public transport services and options disproportionately impacts on disabled people, women and younger and older people** in particular. This may result in differential impacts of changes to service provision for a particular time of day or route for people in different groups of protected characteristics. It is also important to acknowledge the links between socio-economic disadvantage and many of the groups with protected characteristics. Women, people with disabilities, and people in some ethnic groups are more likely to have lower incomes or live in areas of deprivation. They are therefore typically also affected by issues around affordability of transport, and dependency on public transport to access employment, health facilities and other services. These impacts are likely to be compounded in rural areas where current levels of public transport provision and connectivity can act as barriers giving rise to a range of socio-economic impacts and equalities issues.

The SPT region is demographically and spatially diverse with a large number of disadvantaged and access-deprived communities. The region has many challenges associated with poverty, deprivation and inequalities of outcome from socio-economic disadvantage. Overall 15% of the region's population is income deprived compared to 10% in Scotland overall. The rate of child poverty is also higher in the SPT region than in Scotland as a whole and there are other inequalities in key labour market indicators including rates of unemployment and underemployment. It is recognised that **transport has an underpinning role in tackling poverty, socio-economic and health inequalities and supporting inclusive economic growth**. It helps people to get to work, education and training opportunities, to access healthcare and other services and to participate more fully in society. In particular, many jobseekers rely on public transport (particularly the bus) to reach these opportunities. In addition, **the cost of transport is a significant barrier in people's ability to use the transport network**, and the cost of public transport fares is one of the top transport-related challenges in the SPT area.

The key factors affecting the ability of children and young people to access transport are their socio-economic background, geographical location and the accessibility and safety of public transport available[16]. Access to education and employment by public transport is vitally important and the **location, convenience and cost of public transport are typically the key factors affecting inequality and transport**, particularly for low-income families and **the cost of transport can act as a barrier**

[12] First Bus to invest £35m in green transport for Glasgow and Aberdeen with ScotZEB funding from Transport Scotland – FirstGroup plc

[13] Stagecoach in Kilmarnock to benefit from a £6M investment in new electric buses | Ayrshire Daily News

[14] Zenobē expands collaboration with McGill's to increase accessibility of sustainable transport in Scotland - Zenobē (zenobe.com)

[15] sp080923_agenda8.pdf (spt.co.uk)

[16] https://www.transport.gov.scot/consultation/nts2-delivery-plan-impact-assessments-consultation/

to accessing employment and education as well as to educational choices and progress into employment (although noting the introduction of the Young Persons' (Under 22s) Free Bus Travel Scheme in January 2022, which now provides free travel for anyone under 22).

The population on the islands of Cumbrae and Arran (those within the SPT area) is typically older than for the rest of the North Ayrshire and SPT areas, with over 30% of people aged 65 or over on these islands compared with 22% in North Ayrshire and 18% in Scotland[17]. Transport is a fundamental issue for island communities and is a key factor in the ability of people living in the islands to access services and employment, especially given the greater reliance on public transport for older residents. **The cost of transport within island communities is a significant factor and contributes to an overall higher cost of living** relative to other locations, and poor island transport connections, which can limit opportunities and efforts to reverse depopulation trends.

It is clear from this impact assessment scoping that **improvements and changes to the bus network and services in the Strathclyde region have the potential to significantly impact many people and communities positively**. Full consideration of the potential benefits in this regard will feed into the option development and appraisal process.

Clyde Metro

The Clyde Metro (shown in Figure 7), a recommendation in the Strategic Transport Projects Review[18] sets out the development of a metro transport system for the Glasgow City Region. The Clyde Metro is to be multi-modal system with a combination of bus rapid transit, tram, light rail, and metro rail to complement the service by traditional railways and Glasgow Subway. Clyde Metro is also included in the National Planning Framework 4 as an opportunity *to substantially reduce levels of car-based commuting, congestion and emissions from transport at scale.*

The Clyde Metro project would be a multi-billion investment over a 30-year period to better connect 1.5 million people to employment, education, and health services in and around Glasgow. While freeing up rail capacity for longer distance trips, Metro seeks to tackle social exclusion, encourage fewer car journeys, and reduce greenhouse gas emissions. Clyde Metro will have major impacts on the way public transport interacts across Glasgow and the wider area and its **success requires an increasing need for deep integration of public transport services and fares, currently not easily provided through the existing commercial bus delivery model** – with the current deregulated bus market accentuating issues around competition and integration.

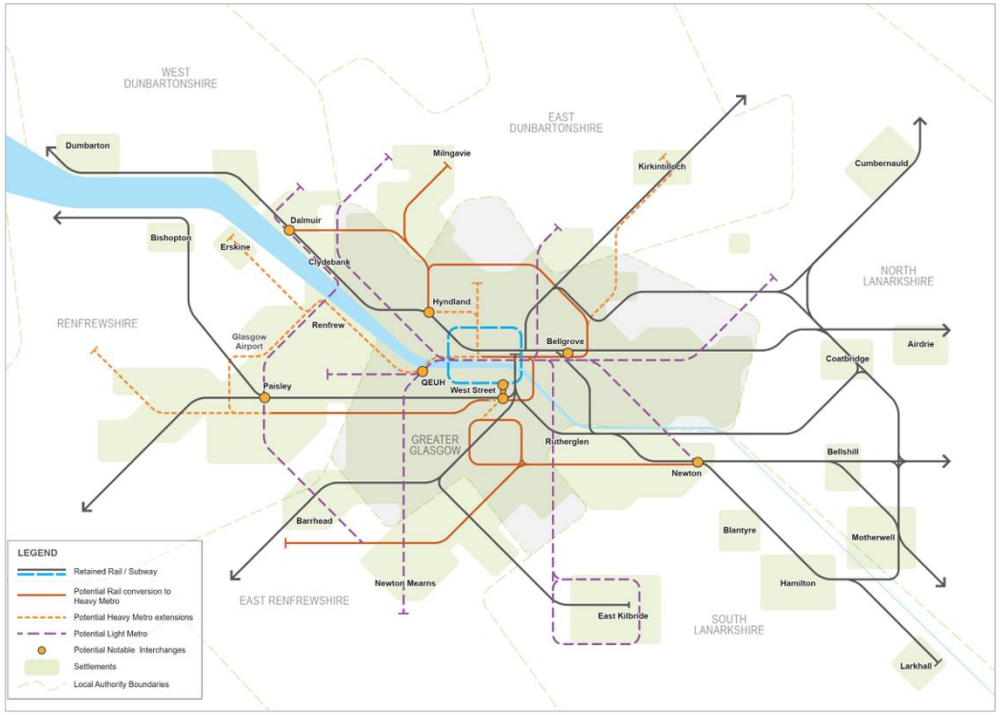


Figure 7: Clyde Metro – Indicative Network

The RTS sets out a policy aiming for a world class passenger focused public transport system. Bus has a role to play in delivering the RTS and support the successful delivery of other social, environmental and economic policy at national, regional and local level.

[17] Mid-2021 Population Estimates Scotland | National Records of Scotland (nrscotland.gov.uk)

[18] Strategic Transport Projects Review 2 | Transport Scotland

THE BUS NETWORK IN THE REGION – RECENT TRENDS

Buses are the backbone of the public transport network across Strathclyde. However, the bus network in the region has been on a very different trajectory compared to other public transport modes in recent years. This section sets out the key trends over the last decade or so in terms of passenger journeys and bus kilometres, and how this compares to other transport modes.

Passenger Journeys

Between 2004/5 and 2019/20 (prior to the COVID-19 pandemic), bus passenger journeys in the South West and Strathclyde region of Scotland fell by 74million[19], after reaching a peak in 2008/09 (as shown in Figure 8 and Figure 9) when 234 million journeys were undertaken by bus. Passenger journeys have been slowly declining since the 2008/9 peak, with passenger journeys undertaken in 2019/20 representing just over 60% of passenger journeys undertaken at the peak. While this trend is also seen in the rest of Scotland and indeed is not unique to Scottish regions nor the UK, the extent of the decline in the west of Scotland has been more severe than elsewhere in the country.

The most recent data from 2021/22 showed that bus passengers were 35% down on the 2019-20 figure, but this data does reflect a period when COVID-19 pandemic restrictions were still in place.

The sustained decline in bus passengers is also borne out in the statistics around bus use with 46% of adults in the region using a bus at least once per month in 2009/10, falling to 38% by 2019.[20] Furthermore, everyday bus use has fallen from 13% of passengers in 2009/10 to 8% in 2019.[21]

While Scottish bus passenger figures are only available from 2004/05, longer term trends at the Great Britian level shows a steady decline in bus use since 1975, as shown in Figure 10[22]. The figure shows that bus deregulation in 1985 did not result in a change in the overall downward trend

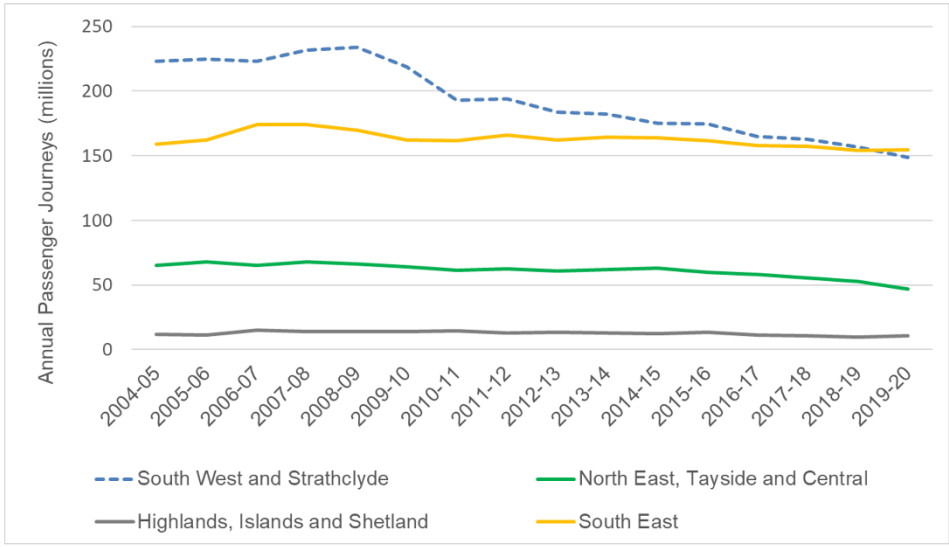


Figure 8: Annual Passenger Journeys (2004/5 – 2019/20) – Actual figures

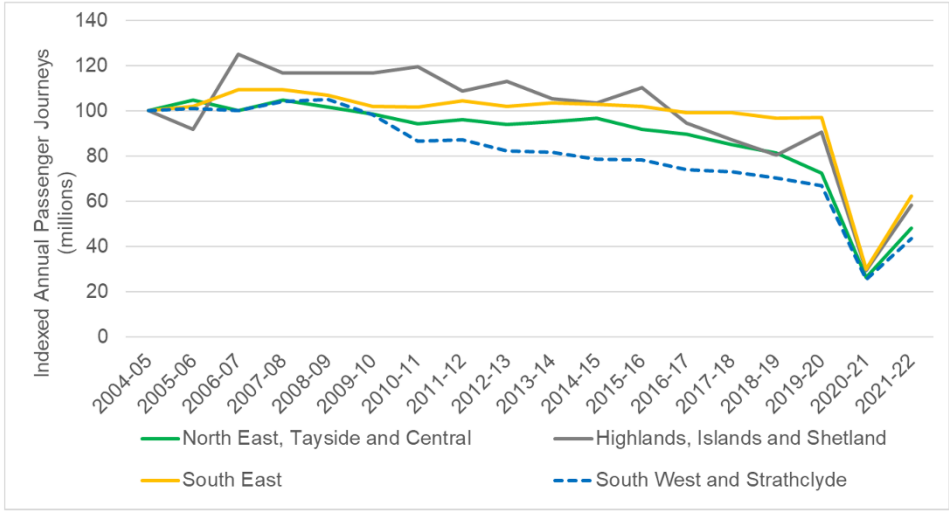


Figure 9: Annual Passenger Journeys (2004/5 – 2019/20) – Indexed to 2004/5 = 100

[19] Scottish Transport Statistics No. 41 2020 Edition Table 2.2b | Transport Scotland

[20] Transport and Travel in Scotland Local Area Analysis 2009-10 and 2019 Table 11 | Transport Scotland

[21] Transport and Travel in Scotland Local Area Analysis. 2009-10, 2012-13, 2014, 2015, 2016, 2017, 2018, 2019, 2021. Table 11 | Transport Scotland

[22] DfT Public Service Vehicle Survey, Transport for London, Office for National Statistics population estimates

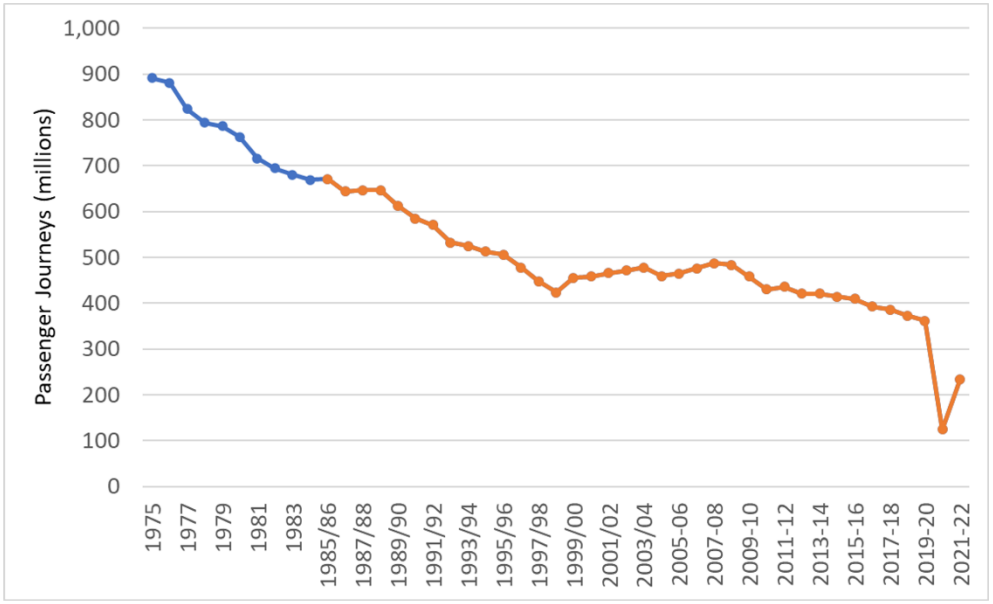


Figure 10: Passenger Journeys on local bus services, Great Britian (1975 – 2021/22)

Trip Purpose

Consideration of trip purpose from the Transport and Travel in Scotland data (as shown in Figure 11) shows a decline in bus use for work and school, and more generally in the use of bus as the main mode of transport. Considering the region as a whole, between 2012/13 and the pre-COVID 2019/20 position, travel to work by bus reduced from 11% down to 9%, travel to school by bus fell from 20% down to 17%, and the use of bus as the main mode of transport fell from 10% down to just 4%.[21]

The most recent statistics reflect 2021/22 data and hence include a period affected by a variety of COVID-19 restrictions. The figures show a slight increase in bus as the main mode of transport in 2021/22 from the 4% figure in 2019/20 to 5%[21.] However, this was still very much down on the 2012/13 figure of 10%.

The COVID-19 pandemic has had a significant and ongoing impact on the use of public transport, and the longer-term emerging trends of increased home working and online shopping means demand has not recovered to pre-pandemic levels. As of mid-September 2023, at the GB level DfT reported that for bus boardings (outside London) weekday bus usage has been between 71% to 92% of the pre-Covid baseline.[23]

Figure 11: Bus use by trip purpose. Change: 2012/13 – 2019/20

Vehicle Kilometres

Mirroring the decline in bus passengers since the 2008/9 peak, as shown in the figures below, there has been a steady decline in bus vehicle kilometres operated across the South West and Strathclyde region (as shown in Figure 12 and Figure 13), with a reduction of approximately 20 million annual vehicle kilometres operated. Again, this decline has been greater than in other Scottish regions.

The most recent data from 2021/22 showed that bus kilometres were 20% down on the 2019/20 figure, but this data does reflect a period when pandemic restrictions were still in place. More recent data from SPT suggests that bus kilometres operated in 2022 were still 18% lower than in 2019.

[23] https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic/domestic-transport-usage-by-mode

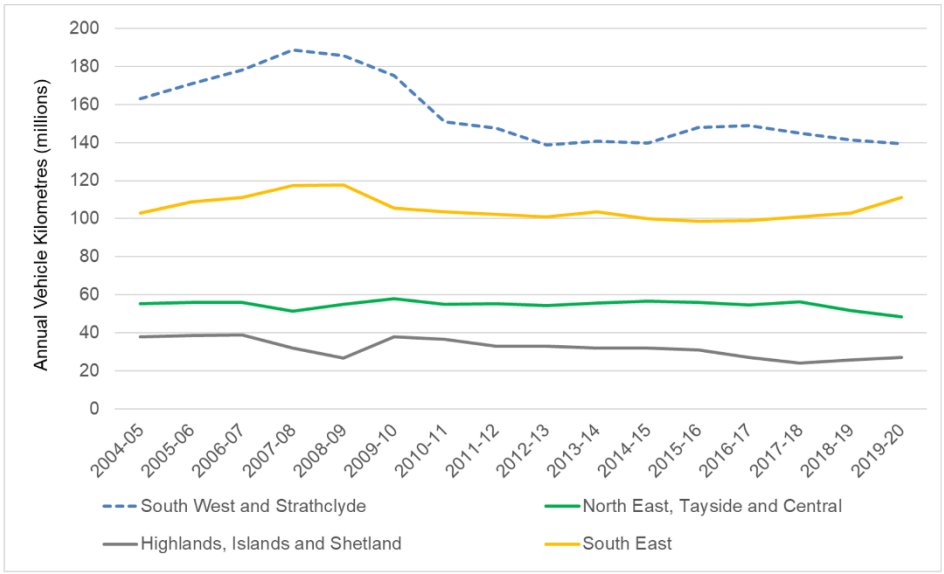


Figure 12: Annual Vehicle Kilometres (2004/5 – 2019/20) – Actual figures

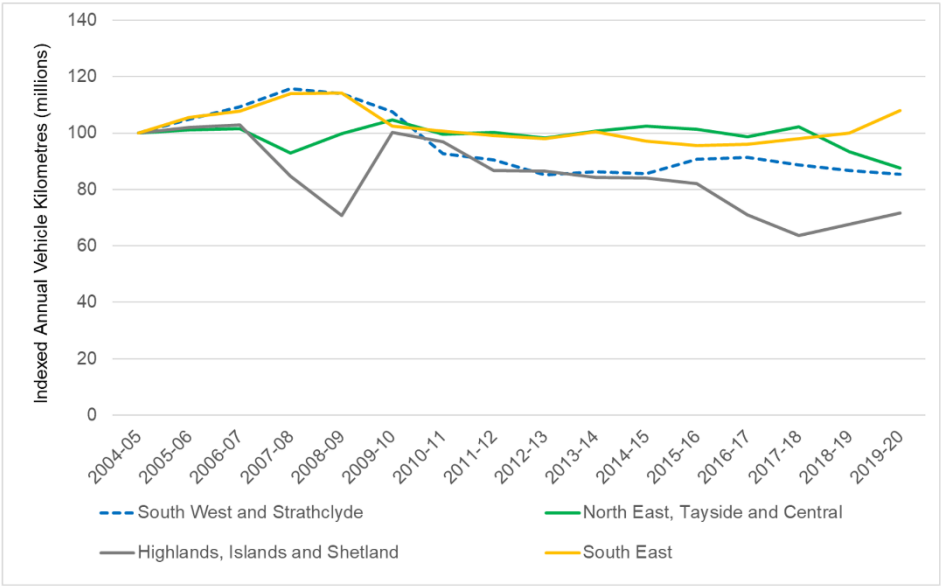


Figure 13: Annual Vehicle Kilometres (2004/5 – 2019/20) –indexed to 2004/5 = 100

Comparison with other modes

Considering the pre-COVID-19 position, comparing annual passenger journeys by bus and rail, as well as car and van vehicle kilometres (through indexing against 2004 levels) across the Strathclyde region, as shown in Figure 14, shows the observed steady decline in bus passengers has not been seen across other modes. Note the figure shows car / van kilometres and not journeys, as no total car trip data is available. However average car / van trip distances have been broadly flat over this period[24] so the trend shown below would be very similar.

Both travel by rail and car / van vehicle kilometres have seen a steady increase between 2004/5 and 2019/20, highlighting a 'revealed preference' of people moving away from the bus. Car ownership has also been increasing with car ownership per 1,000 population rising from 383 in 2001, to 427 in 2011, and to 560 in 2021. This represents a 15% increase over the 20-year period[25]. Bus is therefore the only transport mode to see long term decline this century.

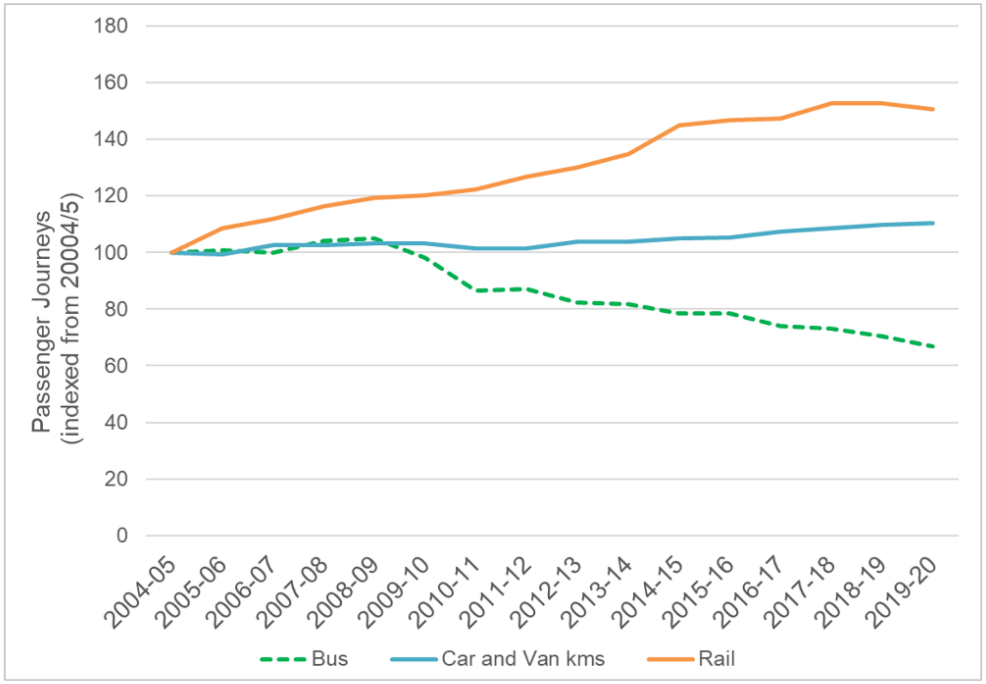


Figure 14: Annual Passenger Journeys – Bus journeys benchmarked against rail journeys and car / van kilometres travelled (SPT area) (2004/5 – 2019/20)

[24] National Travel Survey: 2020 - GOV.UK (www.gov.uk), Table NTS0303

[25] Scottish Transport Statistics 2022 Table 1.2 and NRS Population Estimates Time Series Data Table 1

BUS SERVICES AND NETWORK - OVERVIEW

This section sets out some of the key features of the current bus network and operations across the region, to provide an understanding of the range of operating commercial and supported bus services, where services operate, service frequencies, and the impacts on these services due to delay on the network.

The Bus Network

The map opposite shows the 2023 bus network extents across the region, with the wider bandwidths indicating greater service frequencies on strategic corridors into Glasgow and between the main settlements of Ayrshire and Lanarkshire in particular (when the network is considered across the full day). Services on the network are operated by over 40 different bus operators, with approximately 450 registered services operating within the region.

Commercial and Supported Services

The scheduled bus network, shown in Figure 15, is a mixture of commercial and subsidised services, with SPT acting to support socially necessary services where there is no commercial service and a clear need for public transport connectivity is identified. SPT data from 2019 suggests that around 10% of the total bus kilometres operated in the region are supported services. It should be noted however, that the supported network is constrained by the funding available and could represent a larger proportion of all operated services if budget allowed.

Figure 16 and Figure 17 overleaf show firstly the commercial network in 2019 and 2023 (i.e., pre and post COVID-19), considering evening provision, and clearly shows (as highlighted by the orange ovals) the decrease in the range and extent of the commercial bus network over this time. While the differences in the commercial network are not highlighted on the Glasgow inset, it is clear the density of commercial services between the 2019 and 2023 figures has decreased.

Figure 18 and Figure 19 thereafter show the subsidised network over the same period and clearly shows the marked increase in subsidised service over the same time period. The increase is particularly marked in North and South Lanarkshire and in Glasgow.

While not presented here, analysis undertaken over the afternoon period also shows commercial services decreasing, and subsidised services increasing albeit to a less dramatic extent.

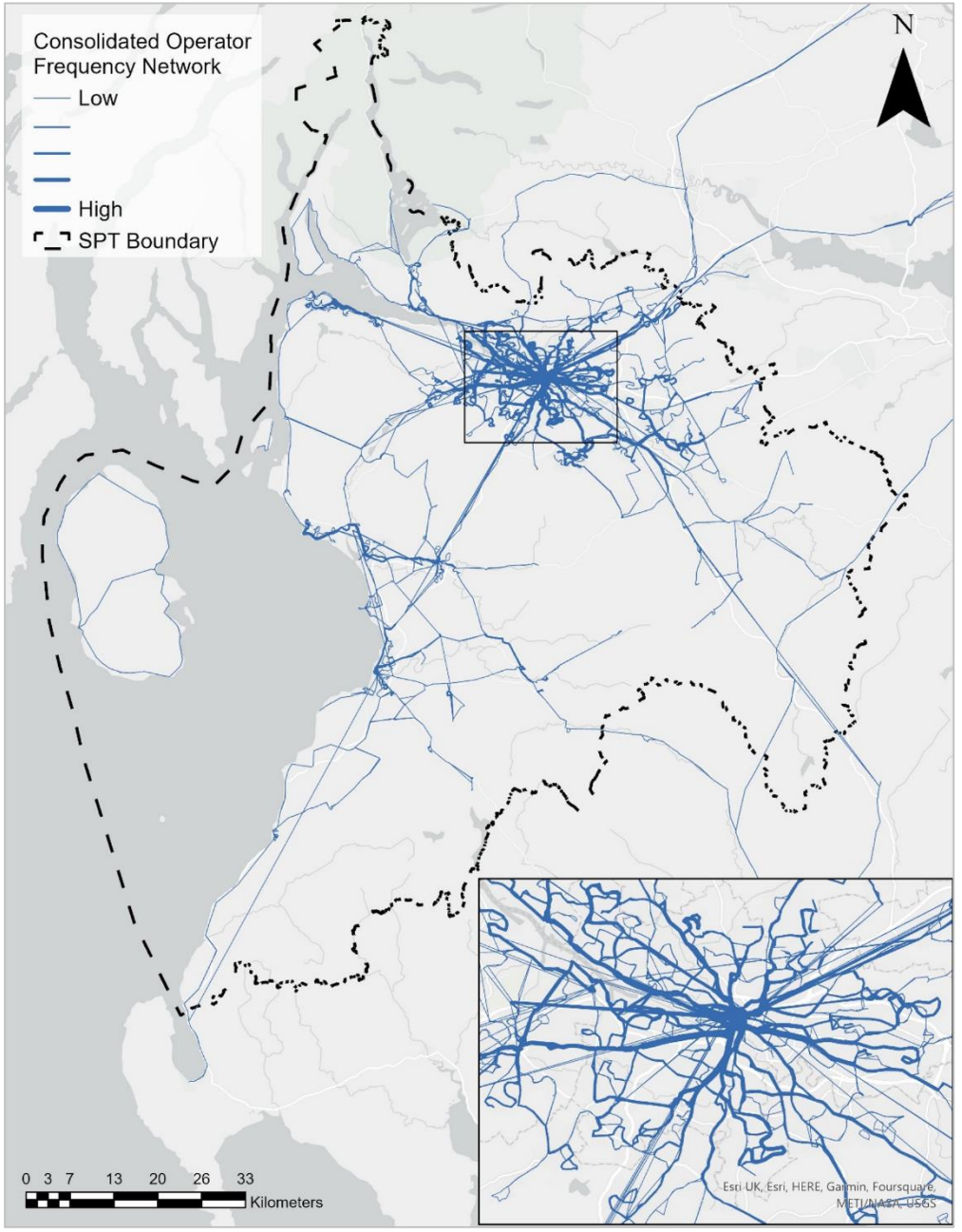


Figure 15: Service Frequency bandwidths

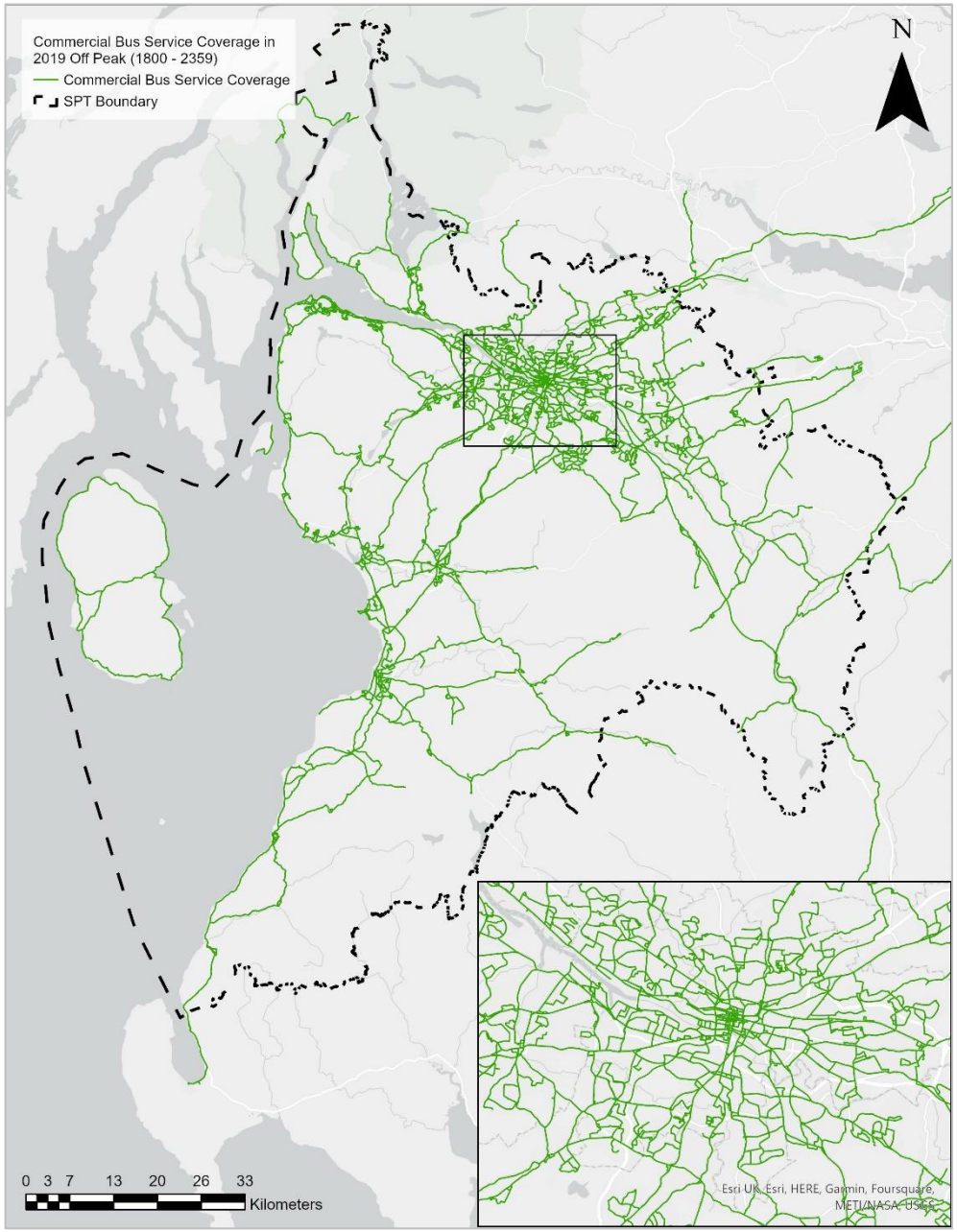


Figure 16: Commercial Bus Network: 2019 (1800 – 2359)

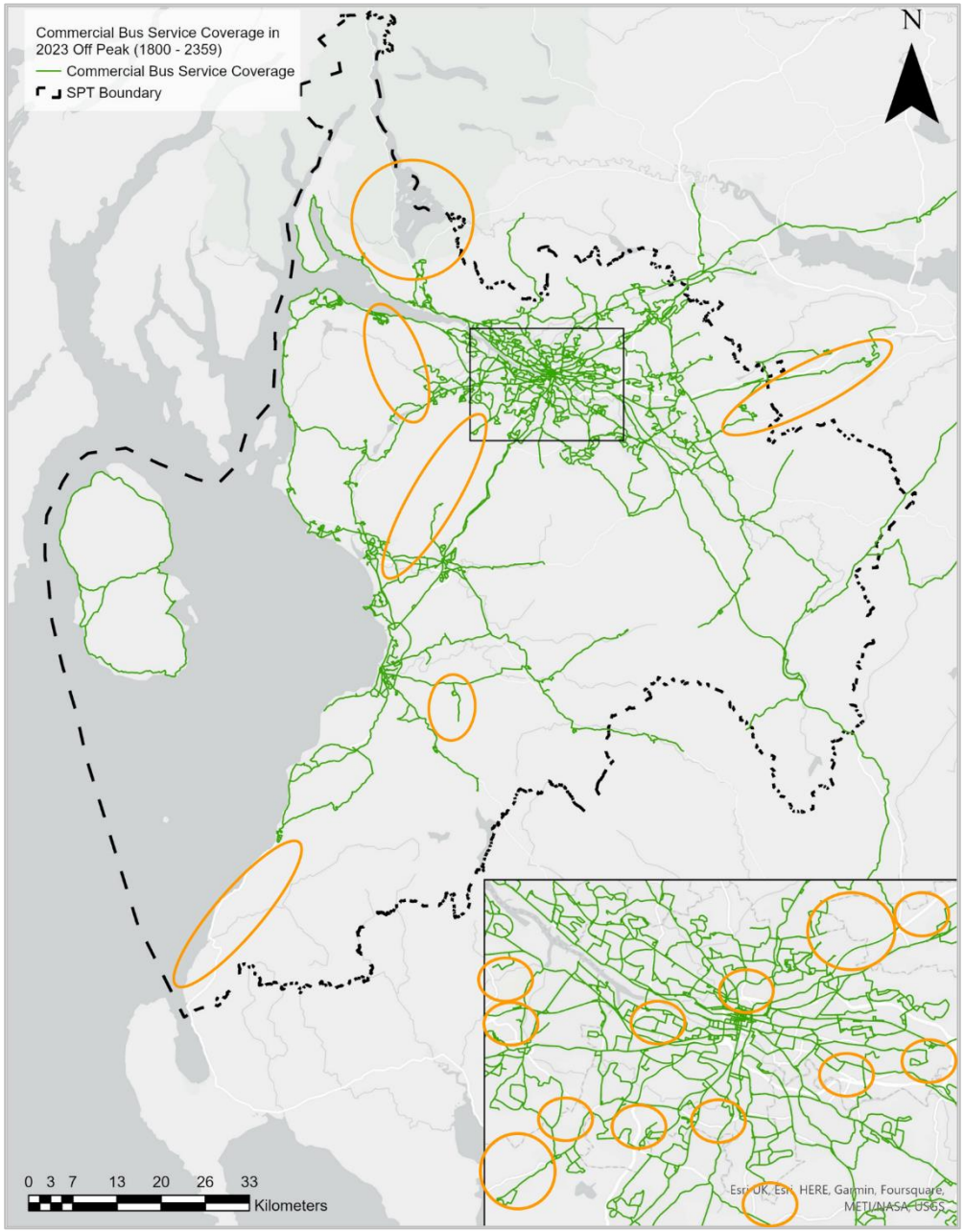


Figure 17: Commercial Bus Network: 2023 (1800 – 2359)

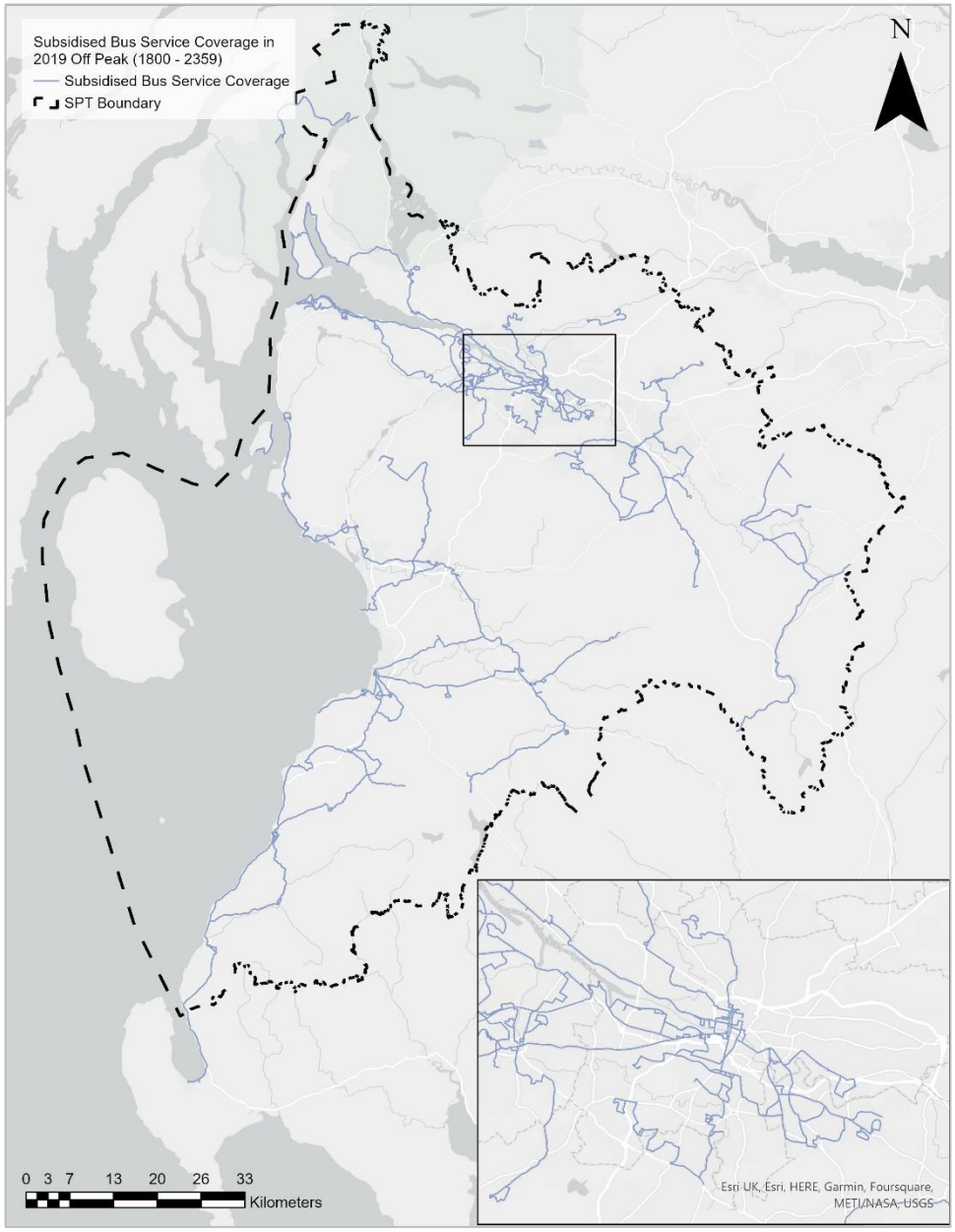


Figure 18: Subsidised Bus Network: 2019 (1800 – 2359)

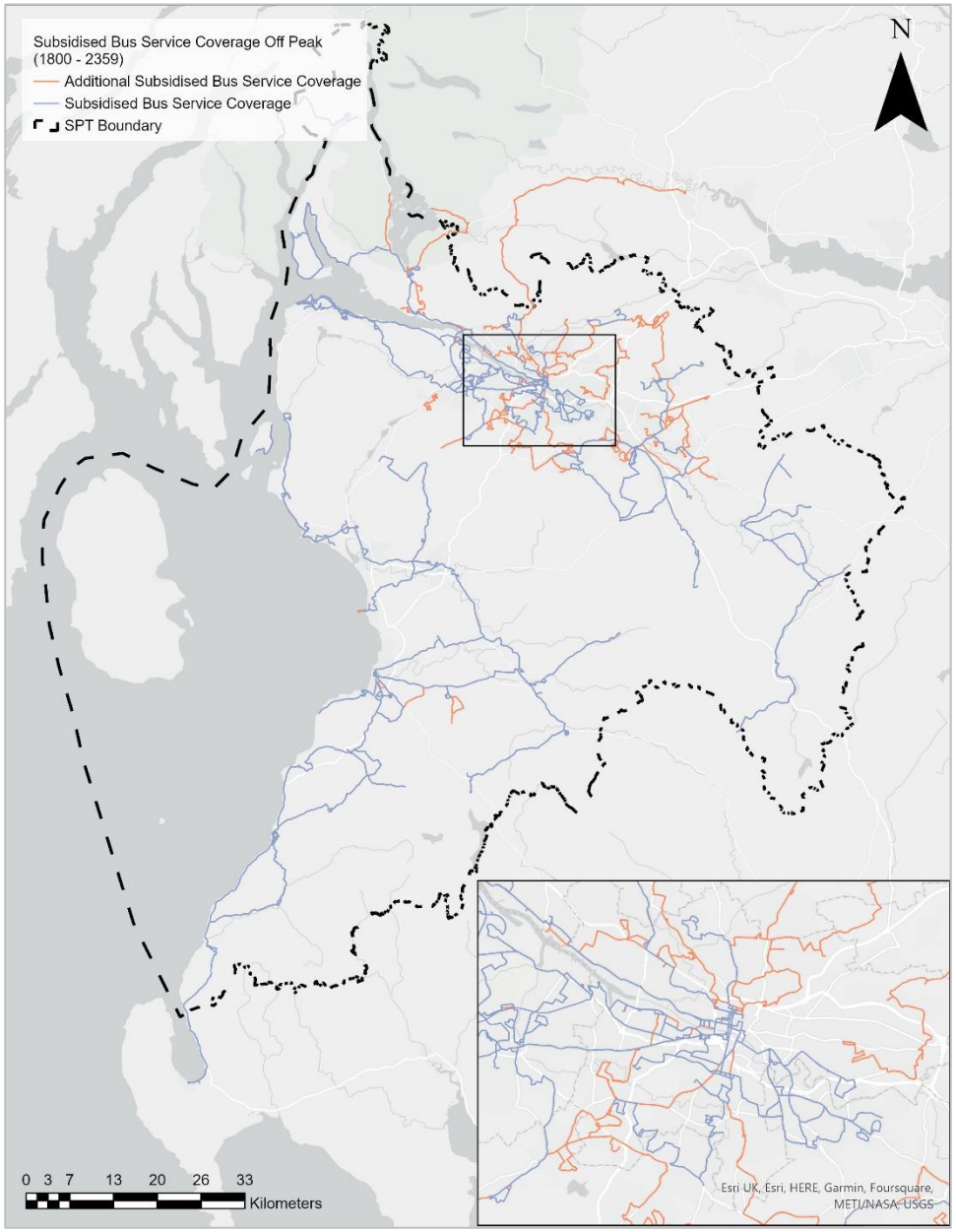


Figure 19: Subsidised Bus Network: Additional service coverage in 2023 (1800 – 2359)

Subsidy Levels

The funding requirement from SPT to contract these subsidised services is also growing both in real terms and in cash terms, as shown in the figure below. The funding requirement while remaining reasonably level between 2012/13 and 2016/17, has been growing ever since and has substantially increased in the 2022/23 spend and the 2023/24 budgeted total - equating to a 16% increase in spending compared to the 2012/13 level. While the costs have risen due to the increasing supported services coverage, the increasing costs also represent the rising operational, and hence contract, costs of service provision i.e., there has been an increasing cost to support the network even without the provision of additional supported services.

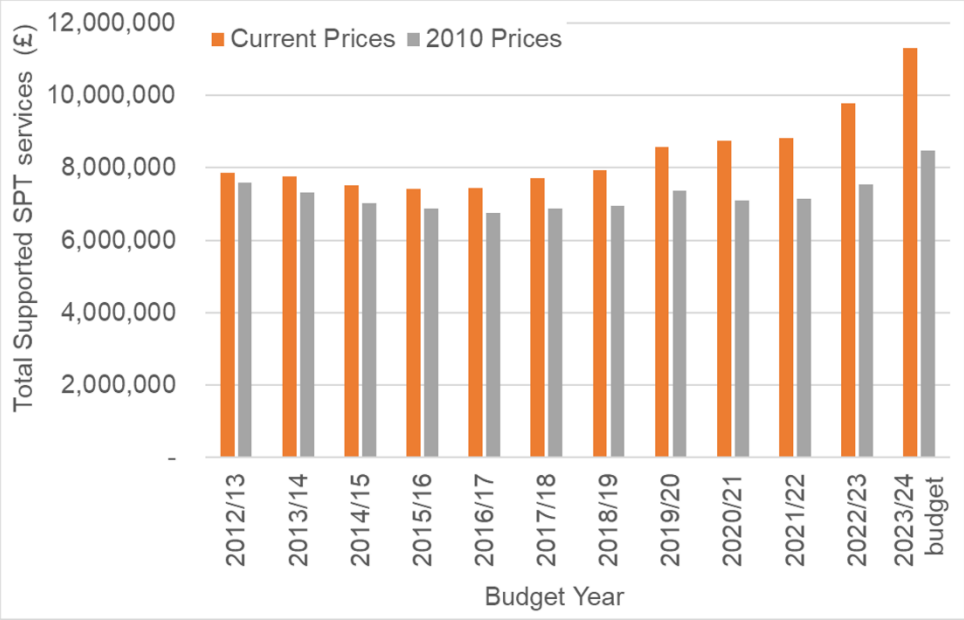


Figure 20: Subsidised Bus Network – SPT Funding: 2012/13 – 2023/24

At the Scotland-wide level, the public money spent per passenger carried (in real terms) increased by 40% between 2006/7 and 2019/20 (pre-pandemic), covering all forms of public support (e.g., grants, concessionary fares reimbursement etc.).[26]

BUS SERVICES AND NETWORK – CONNECTIVITY ANALYSIS

To provide an overview of the bus network, including both accessibility to the network itself, as well as the connectivity provided by the services, detailed spatial analysis has been undertaken at full-postcode level.

The purpose of this analysis is to identify **aspects of the bus service which may not be meeting the needs of the region and therefore the wider policy goals**. Services which do not fully meet the needs of the region will undermine these policy goals, especially the 20% reduction in car kilometres where providing attractive and affordable alternatives to the car is essential, and buses clearly have a key role to play in providing this alternative. This section therefore considers the current network of services in terms of **convenient access to bus stops**, **service frequency**, **direct connections to Glasgow**, **evening services**, **Sunday services**, **bus journey times compared to car**, **how delays on the road network impact on bus services** and **bus punctuality**.

Analysis at full-postcode level provides enhanced granularity to inform the case for change with each postcode representing a handful of households. Summing the associated number of households contained within each postcode which meet different criteria has enabled a detailed understanding of access to the bus network and services, both across the region and by local authority, with the quality of access at very specific locations being able to be understood. This will also provide a baseline for later policy development and options appraisal.

Access to a Bus Stop

Postcode[27] analysis has been used to quantify 'accessibility to the bus network', determined through consideration of the Scottish Government's Urban Rural 6-fold classification.[28] Postcodes with a classification of 1 (larger urban areas) or 2 (other urban areas) are considered to have convenient access to a bus stop if they are located within 400m of a stop (in line with national guidance on the maximum desirable walking distance to a stop). For postcodes classified as 3 (accessible small towns) or 4 (rural small towns), convenient access has been defined as being within 600m of a bus stop. Postcodes falling into the classification categories 5 (accessible rural areas) or 6 (remote rural areas) are deemed to have convenient access if there is a bus stop within 800m. These walk distances have been established using postcode centroids and a representation of street and path networks. Under the walk catchment bands as defined above, the analysis identified that **22% of households across the SPT region do not have convenient access to a bus stop** (as shown in the following map).

[26] Scottish Transport Statistics

[27] The number of households contained within each postcode has been obtained from National Records for Scotland with data taken from Q1 of 2023

[28] Scottish Government Urban Rural Classification 2020 - gov.scot (www.gov.scot)

Table 1 shows the figures at the local authority level and these range from 13% without access in East Ayrshire to 35% without access in East Renfrewshire (the Glasgow City figure is 16%).

Table 1: Percentage households without access to a bus stop by Local Authority

Local Authority	% households without access to a bus stop (under defined walk catchments)
Glasgow City	16%
West Dunbartonshire	16%
East Dunbartonshire	30%
North Lanarkshire	28%
East Renfrewshire	35%
South Lanarkshire	30%
Renfrewshire	23%
Helensburgh and Lomond (Argyll & Bute)	26%
East Ayrshire	13%
North Ayrshire	18%
South Ayrshire	19%
Inverclyde	16%

As can be seen from Figure 21 opposite, those without access to a bus stop (under the defined walking catchments as described above) are generally located around the edge of towns and in the more rural areas.

Residents of these postcodes therefore either cannot feasibly walk to a bus stop or have a longer walk than would reasonably be expected, given where they live. This is likely to deter some people from using the bus and be a significant barrier for those with mobility difficulties.

Data supplied by SPT indicates that, of a total of the 11,441 bus stops in the region:

- 46% have a shelter
- 39% have seating
- 21% have shelter lighting
- 7% have Real Time Information

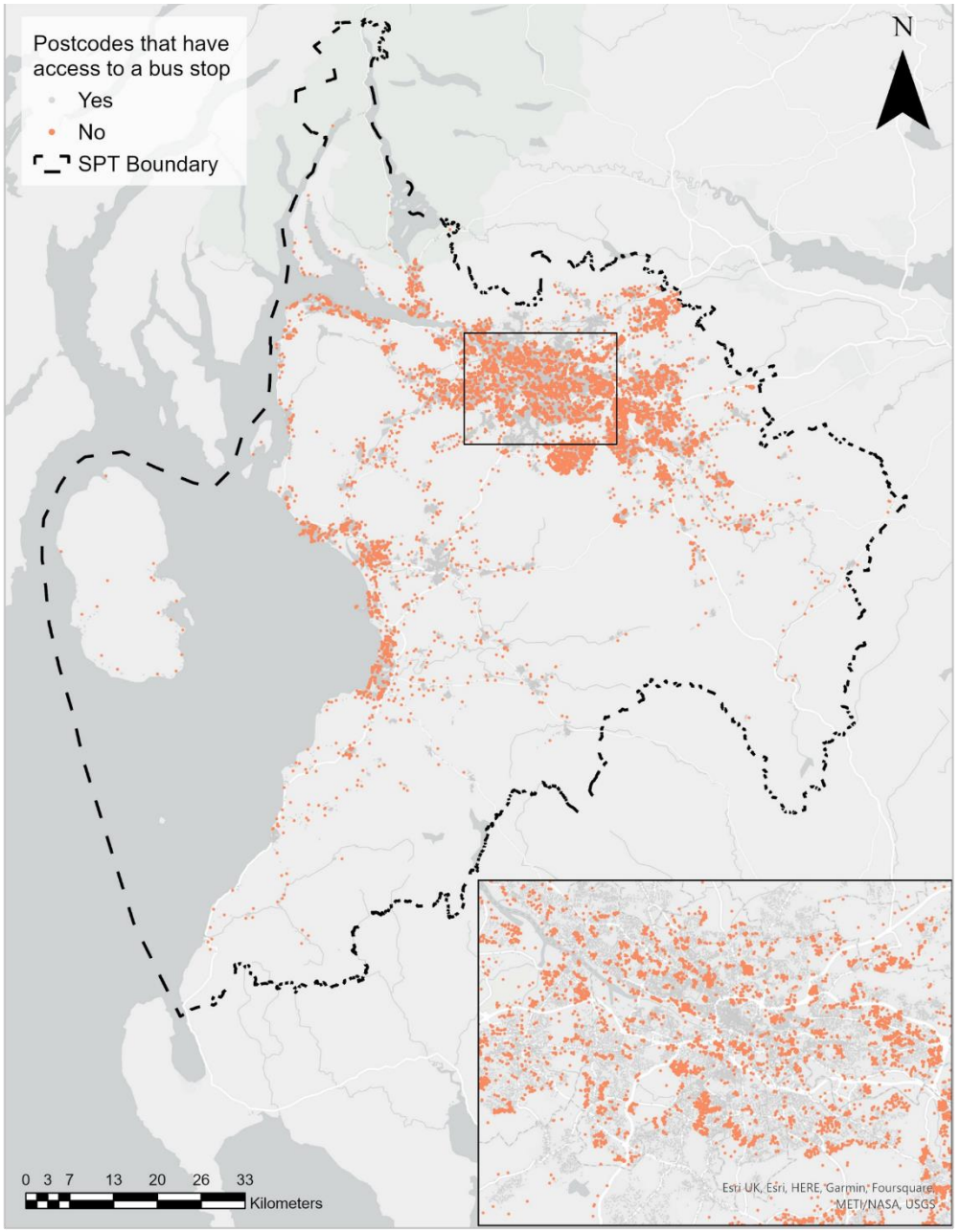


Figure 21: Postcodes with or without access to a bus stop

Weekday Service Frequency

Infrequent services can be a barrier to bus use. Figure 23 opposite shows all bus stops in the region, colour coded based on their average frequency across the day ranging from dark green (most frequent) to dark red (least frequent). The map highlights the large number of services operating on some of the key corridors into Glasgow, with more than 20 buses every hour, equating to a bus approximately every 3 minutes. Conversely, outside of the larger towns, service frequencies reduce and the more rural stops are served less often than one bus every 3 hours. This analysis is further broken down by local authority in Figure 22 below.

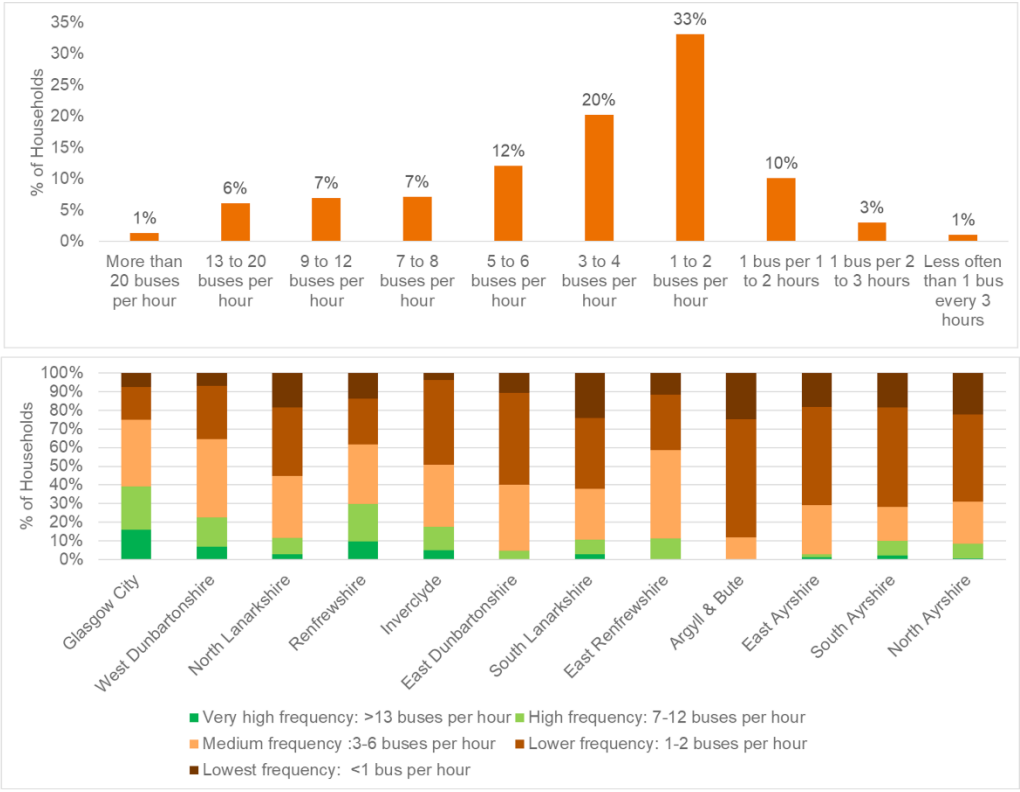


Figure 22: Percentage households with defined bus frequencies (across all local authorities – top, and by local authority – bottom)

Households in Glasgow and Renfrewshire see the highest frequencies with 39% and 30% of households respectively having 'very high' or 'high' frequency services by this definition. Conversely, South Lanarkshire and Argyll and Bute have the highest proportion of households with the 'lowest frequency' services at 24% and 25% respectively.

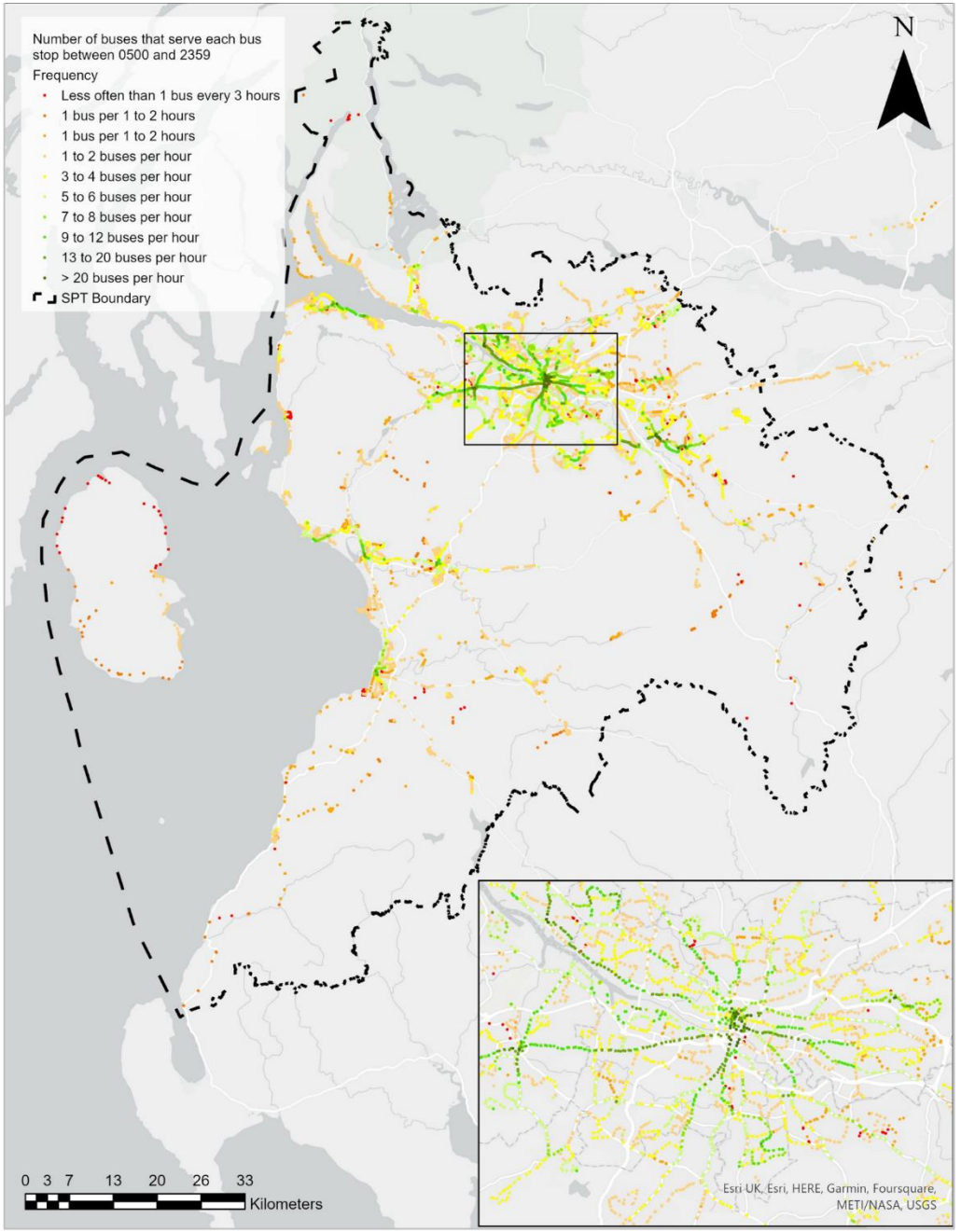


Figure 23: Frequency of bus services by stop

Weekday Direct Access to Glasgow

Glasgow is the major employment, education, healthcare, retail and social and leisure hub of the region and inclusive access to opportunities within the city is important. The importance people attach to direct public transport connections was demonstrated through the consultation process undertaken as part of the development of the RTS (discussed below). The requirement to interchange adds to journey times, can add to costs, introduces uncertainty in making connections and can be difficult or indeed a barrier to travel for those with mobility difficulties.

The ability to directly access Glasgow (taking Buchanan Street bus station as the destination point) by public transport has therefore been considered through consideration of (i) the bus network only; and (ii) the combined bus and rail network, with analysis undertaken for afternoon (1200–1600) and evening (1900–2300) periods. The results are shown in Table 2 opposite, and in Figures 24 and 25 (1200-1600) and Figures 26 and 27 (1900-2300) below.

When considering the bus network only, the analysis shows that **31% of households outside of Glasgow have no direct bus to Glasgow between 1200-1600, increasing to 39% between 1900-2300**. When rail services are included, the picture improves with the proportion of households outside of Glasgow with no direct access to Glasgow reducing from 31% to 19% between 1200-1600, and from 39% to 22% between 1900-2300. However those aged under 22 or 60+ would have to pay to use these connections.

Direct public transport connectivity varies considerably by local authority, with North, East and South Ayrshire particularly poorly connected (73%, 63% and 64% respectively with no direct bus connection to Glasgow between 1200-1600, rising to 100%, 68% and 66% between 1900-2300 respectively). Many of the rural locations poorly served by bus are not within the catchment of the rail network and so rely on bus connectivity. The Helensburgh and Lomond area is also poorly connected by bus in the evening period, but with much better connectivity when both bus and rail modes are considered, given the stations at Helensburgh, Craigendoran and Cardross which are served during the evening period.

Those without access to direct connections may be less likely to travel due to the requirement to interchange and may therefore be missing out on opportunities in Glasgow. Alternatively, they may be experiencing a range of challenges in travelling to Glasgow including long journey times, the need for interchange and reliance on the car (either to drive or for a lift).

Table 2: Percentage of households with convenient access to a bus stop but without a direct connection to Glasgow city centre

Local Authority	% households with convenient access to a bus stop but without a direct connection to Glasgow city centre….			
	by bus (1200-1600)	by bus and train (1200-1600)	by bus (1900-2300)	by bus and train (1900-2300)
Glasgow City	2%	2%	2%	2%
West Dunbartonshire	1%	1%	1%	1%
East Dunbartonshire	2%	2%	3%	3%
North Lanarkshire	27%	11%	30%	14%
East Renfrewshire	2%	2%	13%	2%
South Lanarkshire	28%	23%	39%	27%
Renfrewshire	12%	4%	7%	3%
Helensburgh and Lomond (Argyll & Bute)	28%	20%	94%	22%
East Ayrshire	63%	47%	68%	51%
North Ayrshire	73%	37%	100%	47%
South Ayrshire	64%	48%	66%	49%
Inverclyde	12%	7%	39%	5%
Total	**21%**	**7%**	**14%**	**15%**
Total – outside Glasgow	**31%**	**19%**	**39%**	**22%**

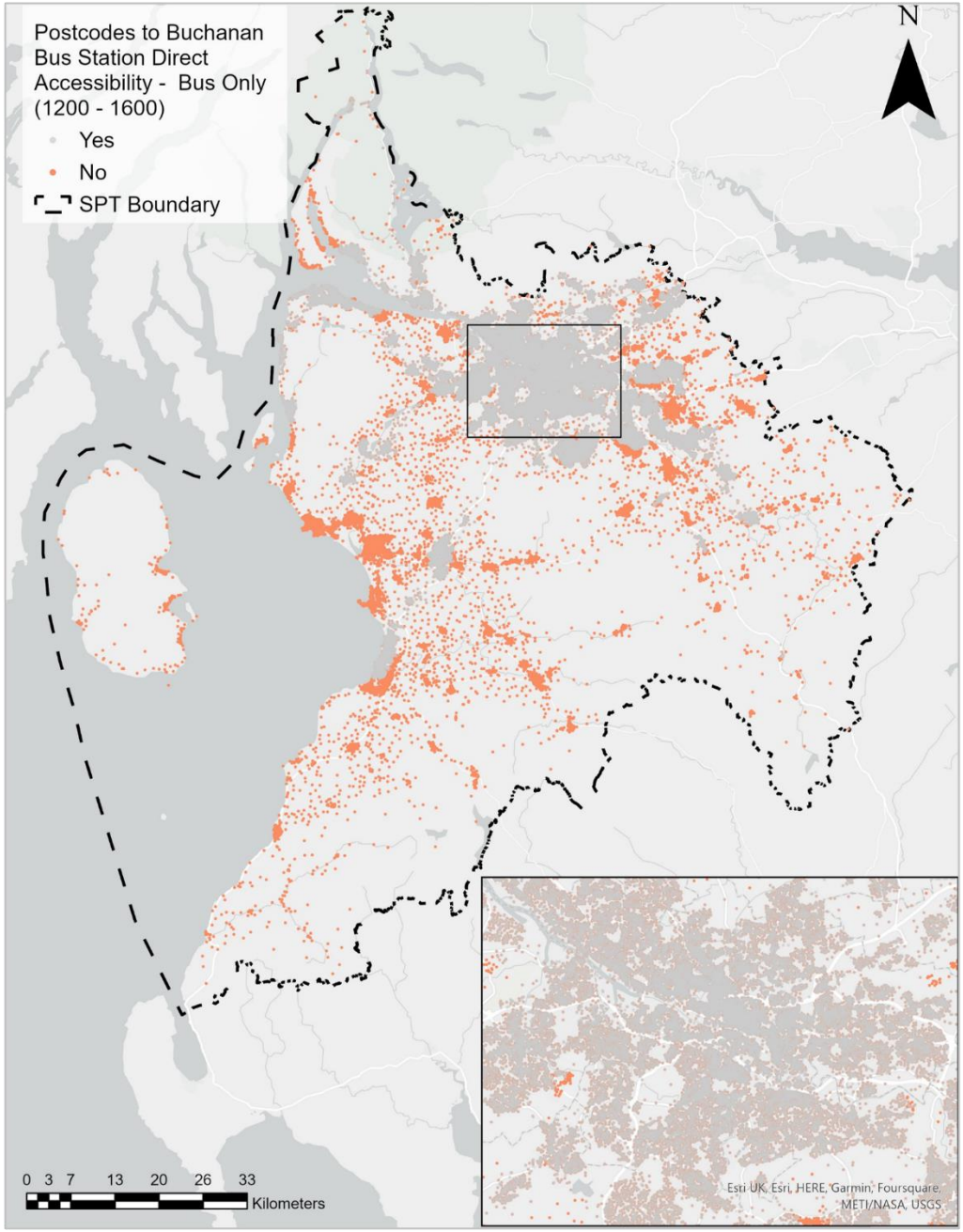


Figure 24: Direct bus access to Glasgow (1200 – 1600)

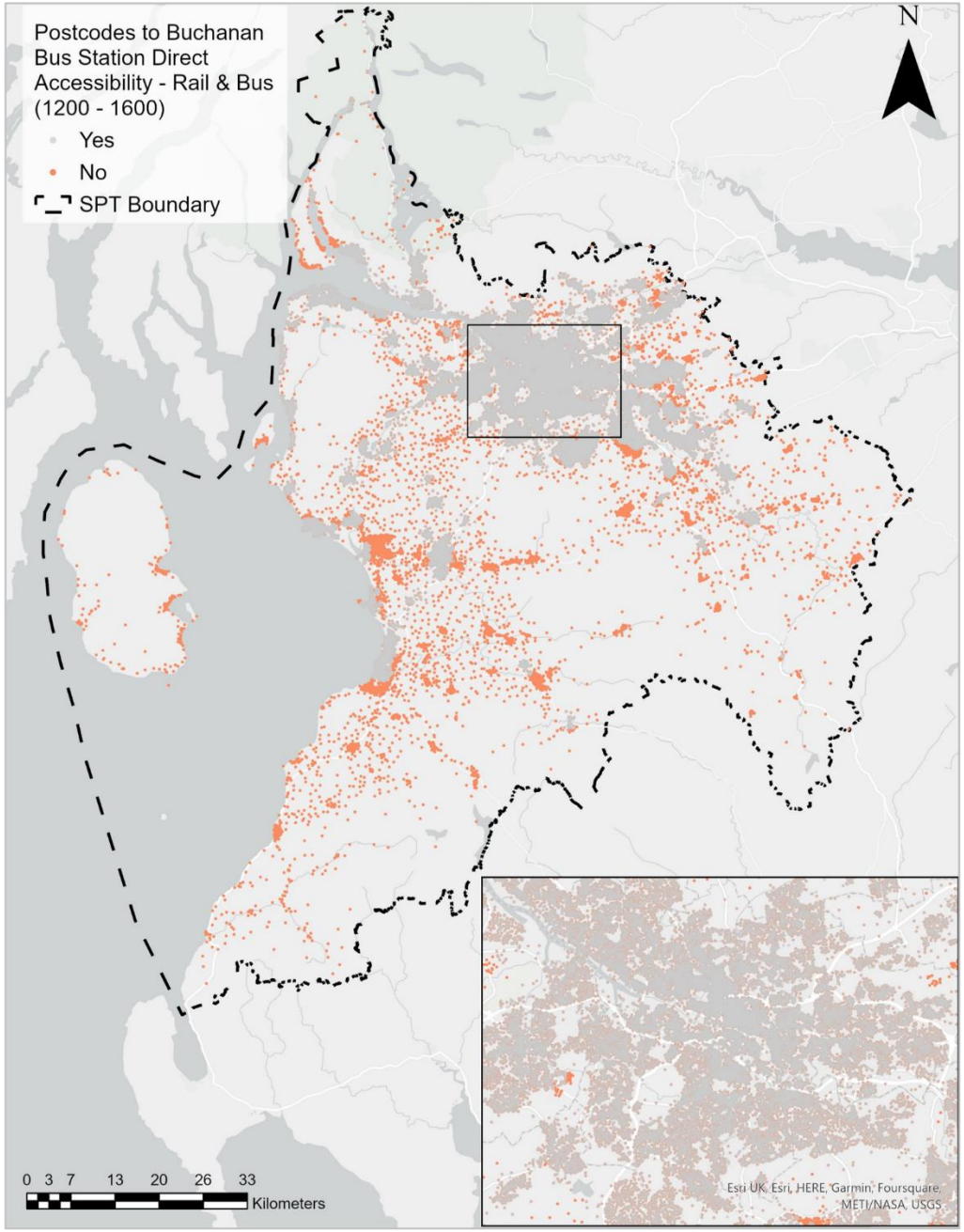


Figure 25: Direct bus and rail access to Glasgow (1200 – 1600)

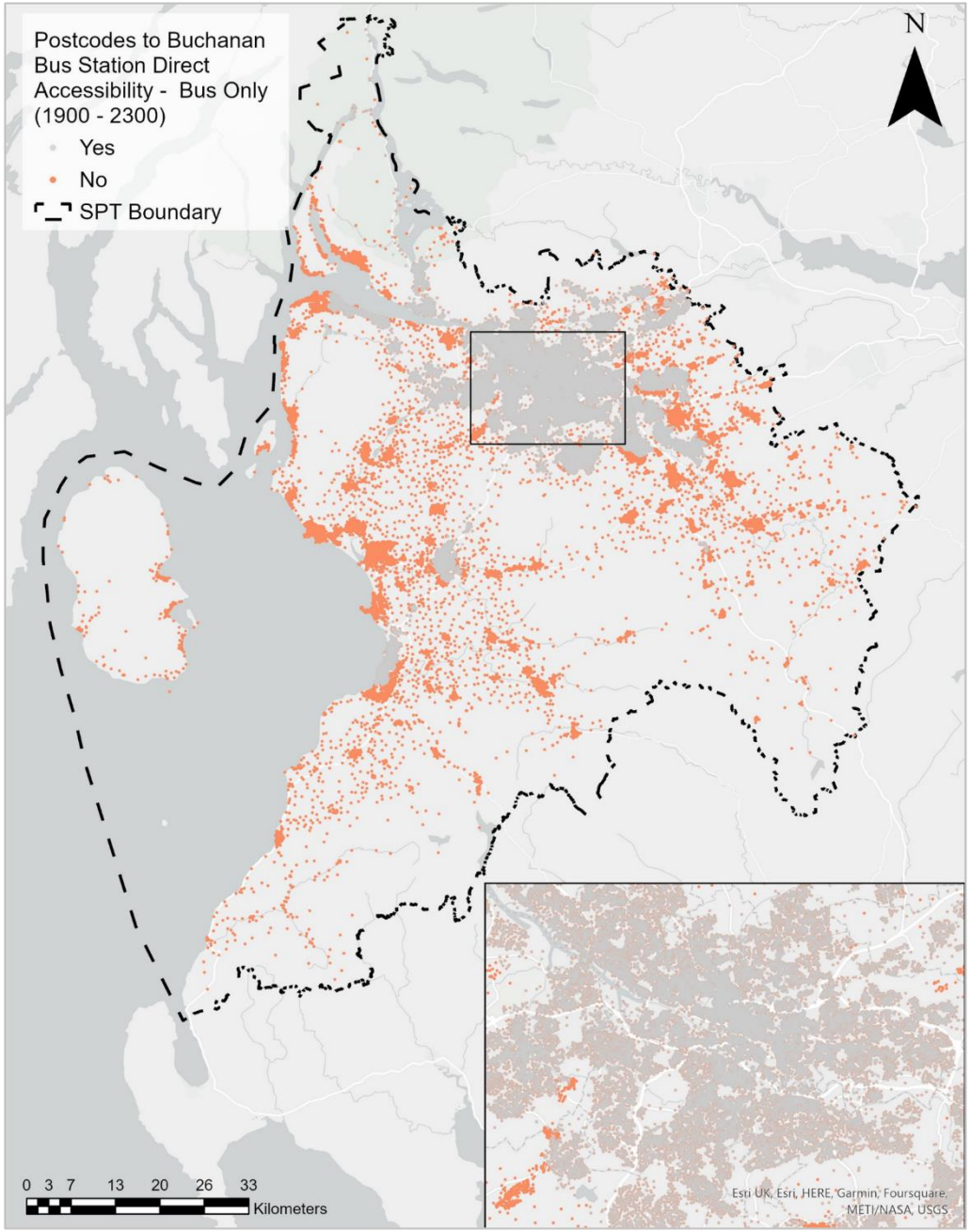


Figure 26: Direct bus access to Glasgow (1900 - 2300)

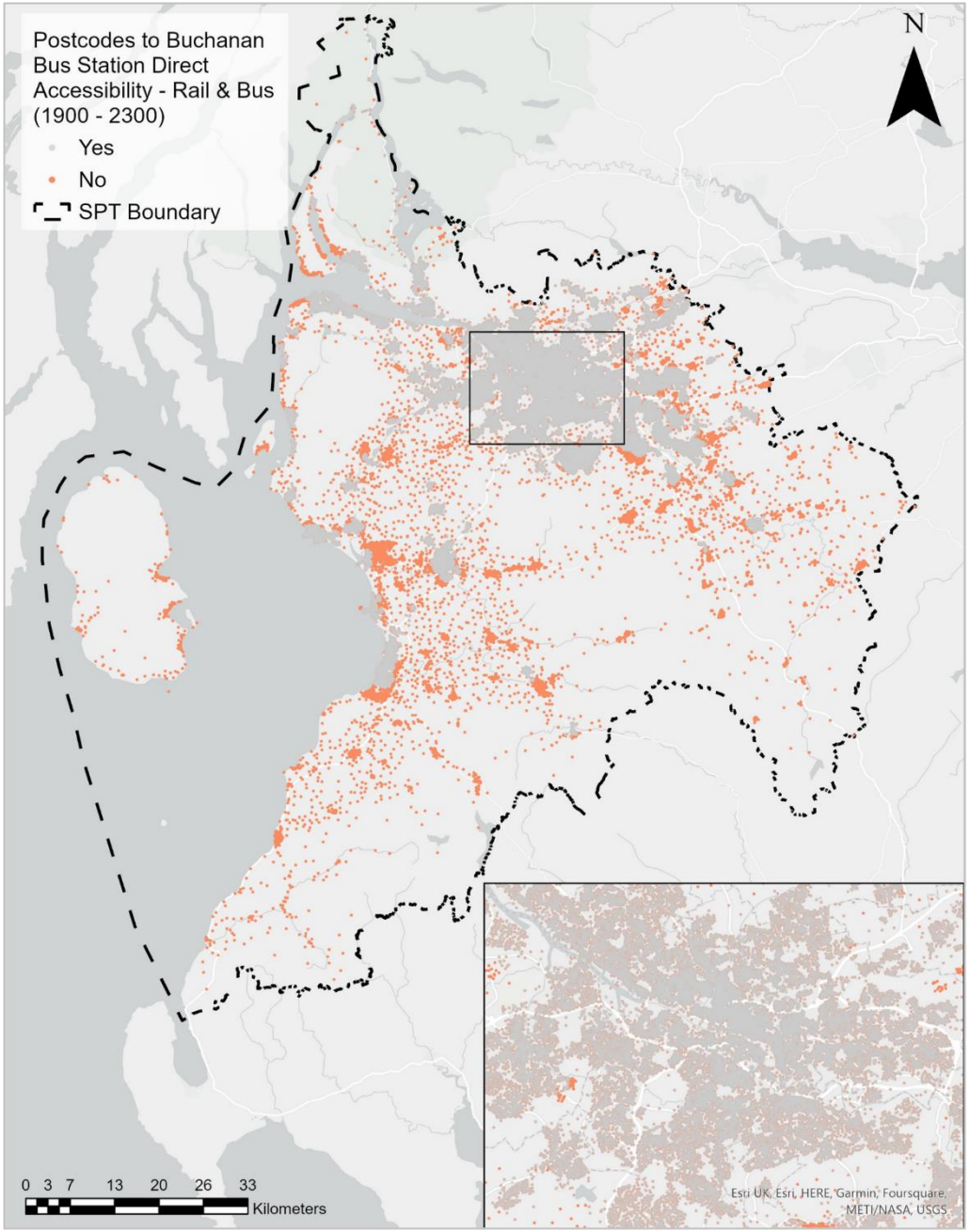


Figure 27: Direct bus and rail access to Glasgow (1900 - 2300)

Weekday Evening Services

Services which do not operate into the evening can limit residents' employment and leisure opportunities in particular. This can lead to people not taking these opportunities, using a car or having to rely on lifts.

Analysis considering access to bus services in the evening, considering when bus stops across the region are served by their last bus (as shown in Figure 28 opposite and Table 3 below) identified that, of those with access to a bus stop, **12% of households have no service after 1900**. This rises to as much as 19% without evening access in South Lanarkshire, and in general, highlights the poor evening bus connectivity across parts of the region.

Table 3: Percentage of households with no access to bus service after 1900

Local Authority	% households with no access to bus service after 1900 (under defined walk catchments)
Glasgow City	8%
West Dunbartonshire	14%
East Dunbartonshire	9%
North Lanarkshire	15%
East Renfrewshire	14%
South Lanarkshire	19%
Renfrewshire	13%
Helensburgh and Lomond (Argyll & Bute)	4%
East Ayrshire	10%
North Ayrshire	13%
South Ayrshire	7%
Inverclyde	13%

For those postcodes considered to have access to a weekday evening service, the frequency of those evening services has also been analysed and shows that many services outside of Glasgow operate with frequencies less than one or two buses an hour in the evening.

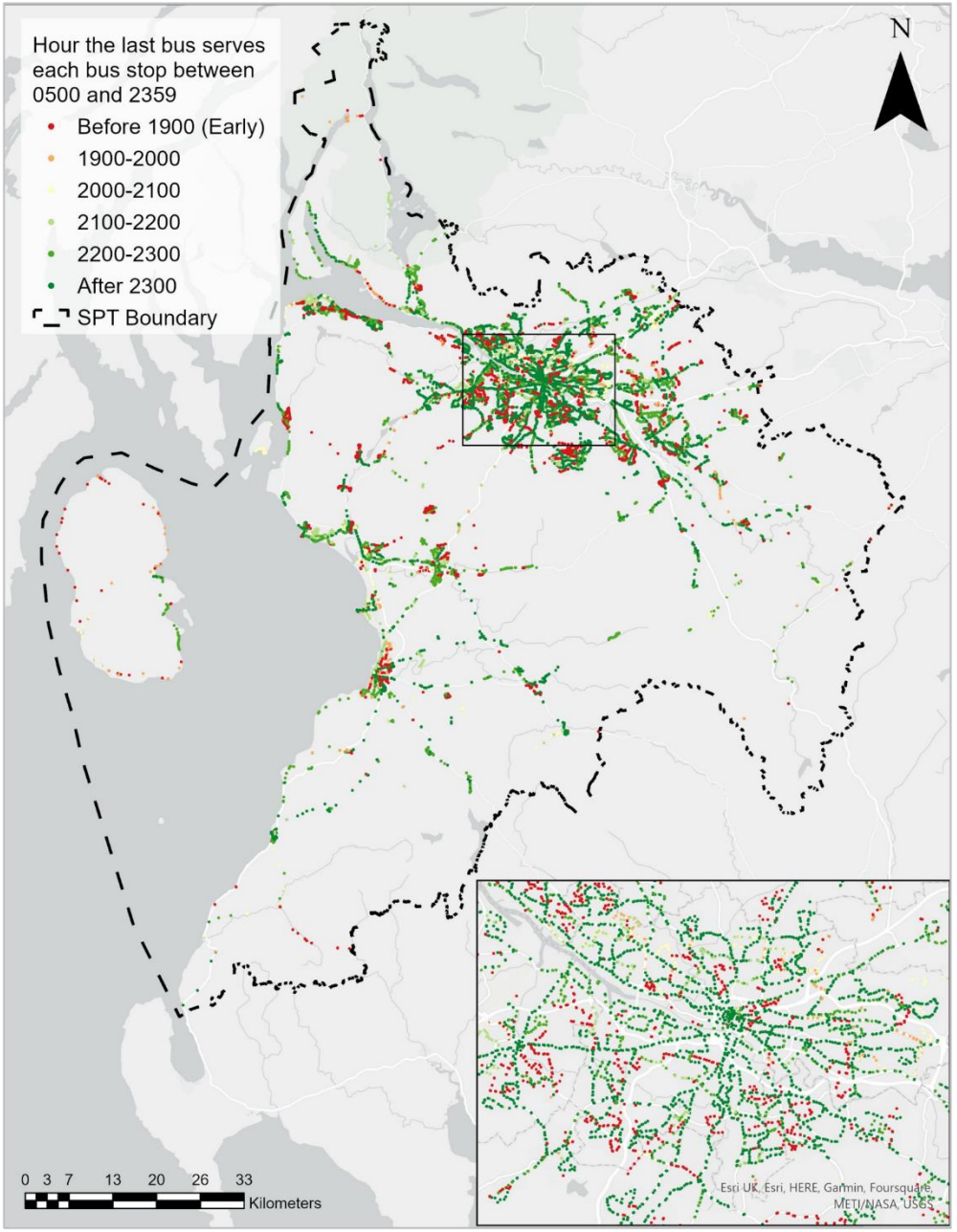


Figure 28: Hour of the last bus at each bus stop

Sunday Services

Many public transport services operate a reduced level of service on a Sunday and this is seen across the region's bus network.

Analysis of Sunday bus services, as shown in Table 4 below and Figure 29 opposite, highlighted that, of those households with convenient access to a bus stop, **12% do not have a Sunday service**.

Table 4: Percentage of households with no access to bus on a Sunday

Local Authority	% households with no access to bus on a Sunday (under defined walk catchments)
Glasgow City	7%
West Dunbartonshire	10%
East Dunbartonshire	10%
North Lanarkshire	16%
East Renfrewshire	13%
South Lanarkshire	17%
Renfrewshire	14%
Helensburgh and Lomond (Argyll & Bute)	6%
East Ayrshire	12%
North Ayrshire	20%
South Ayrshire	6%
Inverclyde	8%

At the local authority level, the absence of Sunday services is most stark in North Ayrshire and South Lanarkshire where 20% and 17% of households with convenient access to a bus stop respectively see no service on a Sunday.

The lack of Sunday services is likely to be affecting employment opportunities for those working outwith the conventional working week and is likely to result in greater car use on a Sunday than would otherwise be the case.

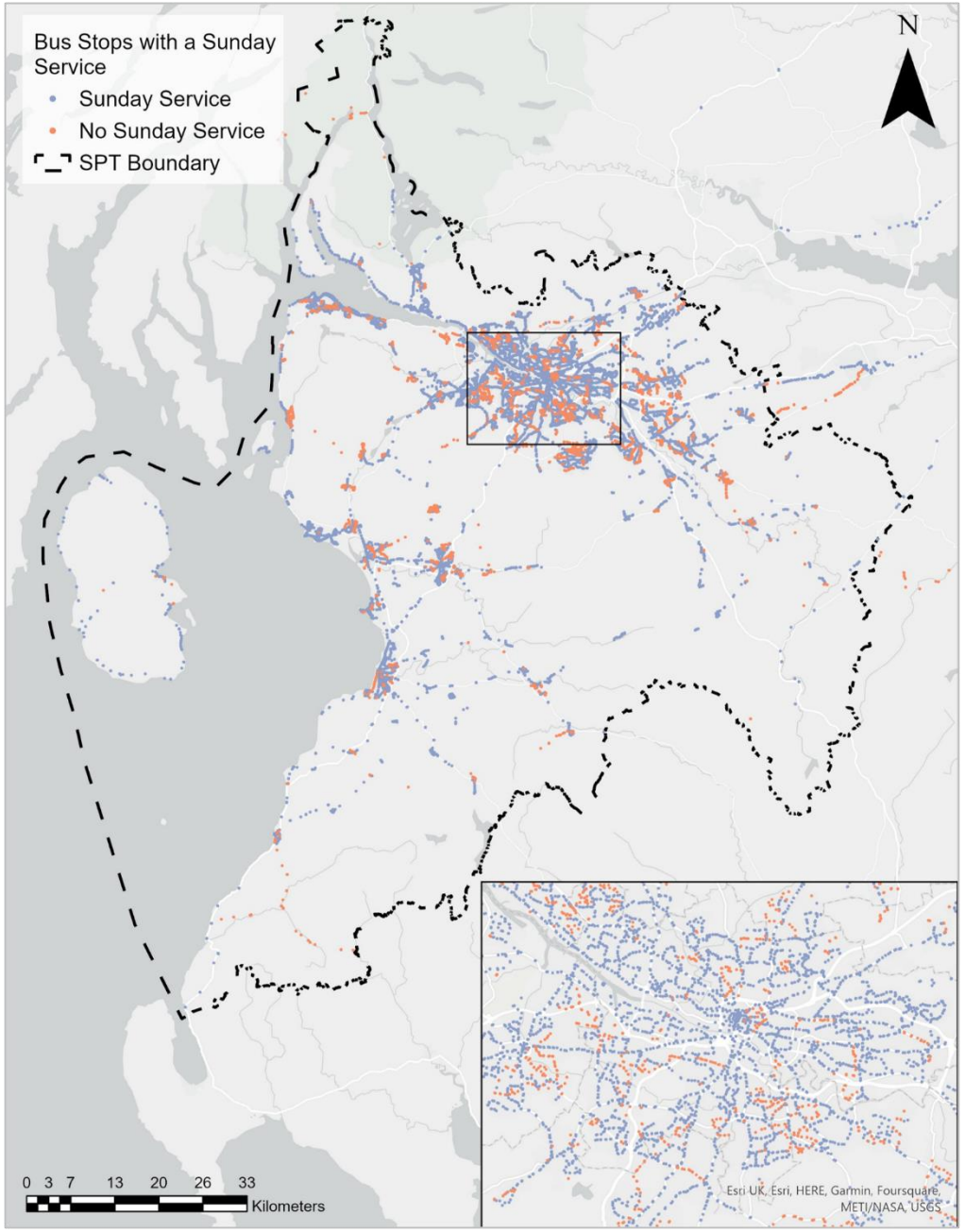


Figure 29: Bus stops served on a Sunday

Delay and its impacts

Delay across the road network has consequences for bus services. Congestion can have impacts on bus journeys through lengthening journey times and reducing reliability and punctuality of services. This, in turn, may lead to increasing operational costs and a less attractive service for passengers.

As congestion increases, operators can either:

- reduce service frequency to maintain operational costs, likely resulting in fewer passengers
- try to maintain service frequency by operating additional services with increased operational costs[29] likely leading to higher passenger fares

Under both scenarios, the longer passenger journey times due to the congestion are likely to negatively impact on patronage.

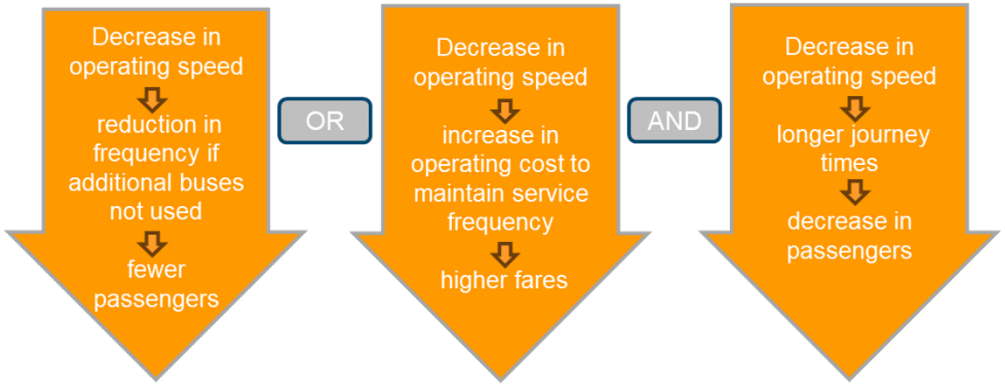


Figure 30: Potential Impacts to buses of increasing congestion on the road network

Elasticity of demand suggests that, in the long run:

- a 10% decrease in bus kilometres operated leads to a 7% fall in patronage in the long run [30]
- a 10% increase in journey time leads to up to a 6% fall in patronage [30]
- a 10% rise in fares will lead to a 10% fall in patronage [30], noting that responsiveness of patronage to fare changes is less sensitive in the peak

Previous research found that Glasgow has experienced some of the worst average bus journey time increases over the 20-year period from 1986 to 2006, with the per annum increase in journey time within Glasgow benchmarked against other UK cities shown in the figure below.[30]

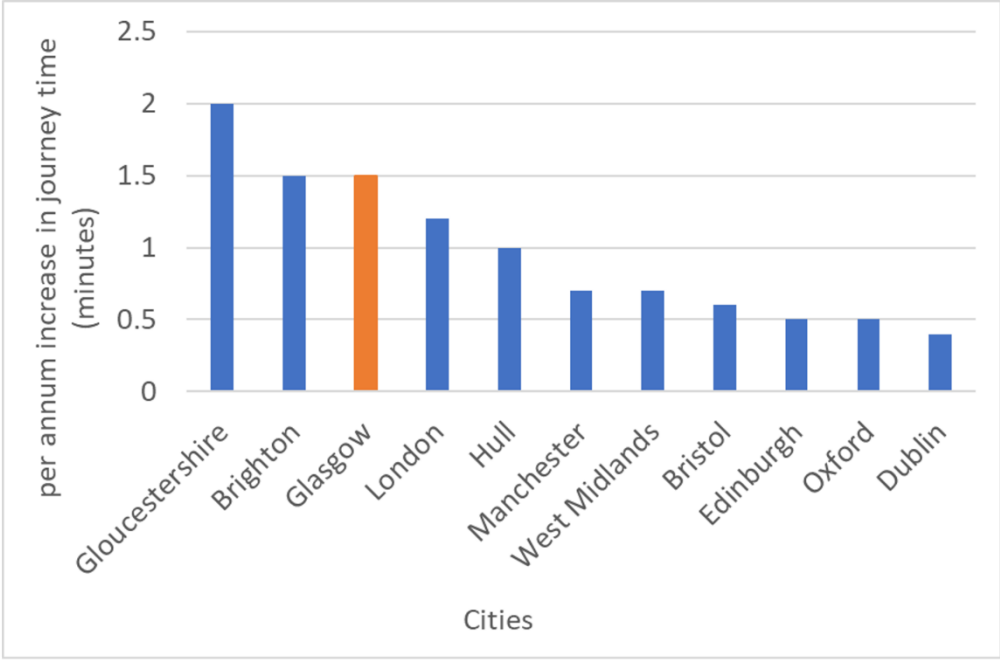


Figure 31: Increase in Bus Journey Times (1986 – 2006) (Recreated from greener journeys report)

Furthermore, analysis undertaken during the development of the RTS considered Real Time Passenger Information (RTPI) data over an approximate three-month period for bus services operating along strategic corridors in the SPT area. The analysis included consideration of inbound and outbound services into Glasgow and compared peak AM and PM periods with an inter-peak period. The analysis of the AM peak inbound and PM peak outbound journey time differences compared to the inter-peak periods are shown in Figure 32[31].

[29] Operating costs may include additional vehicles, drivers, fuel, tyre and overall maintenance costs

[30] The impacts of congestion on Bus Passengers, greener journeys: ttbusreport_digital-single-30aug.pdf (transporttimes.co.uk)

[31] RTS Baseline Analysis Report

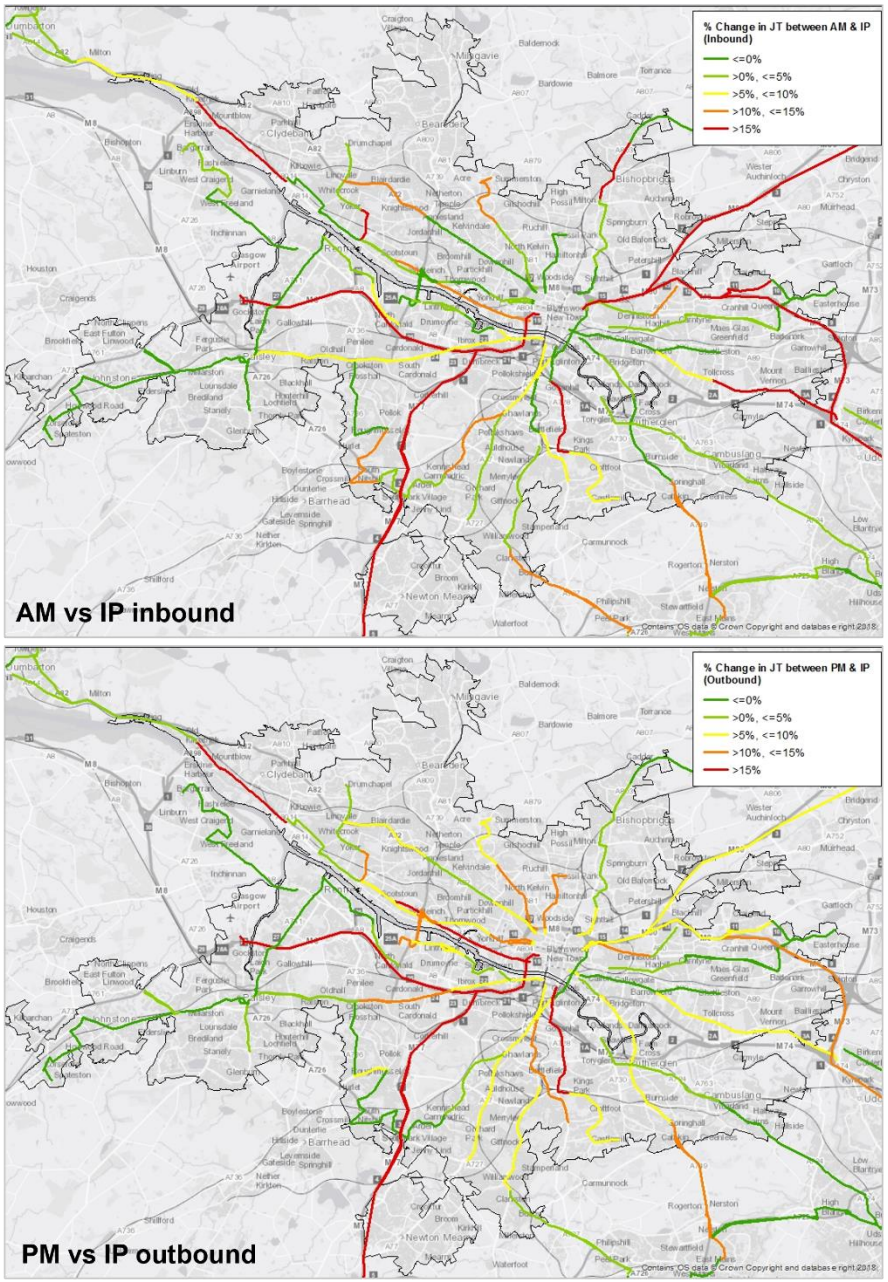
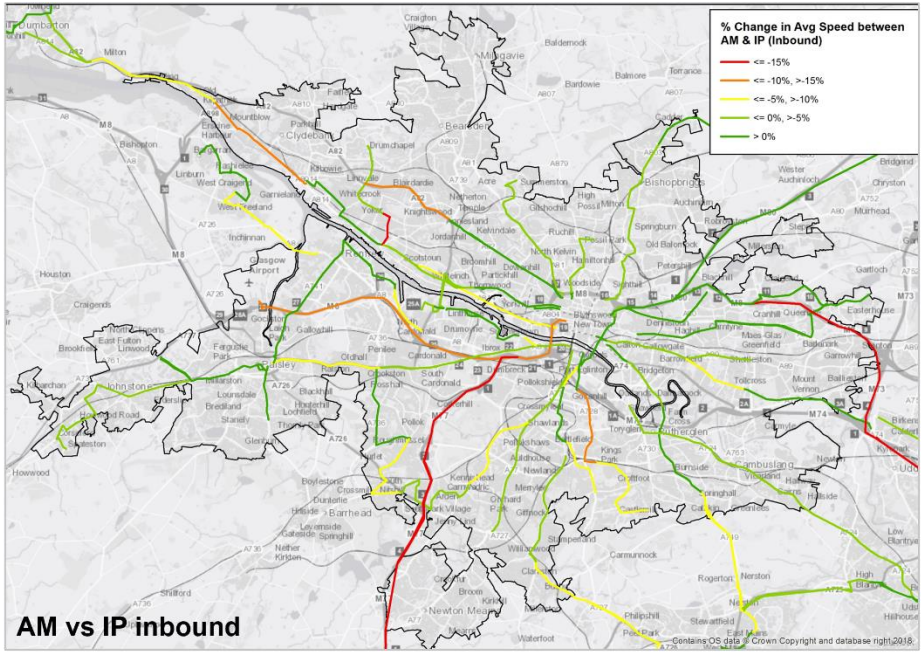


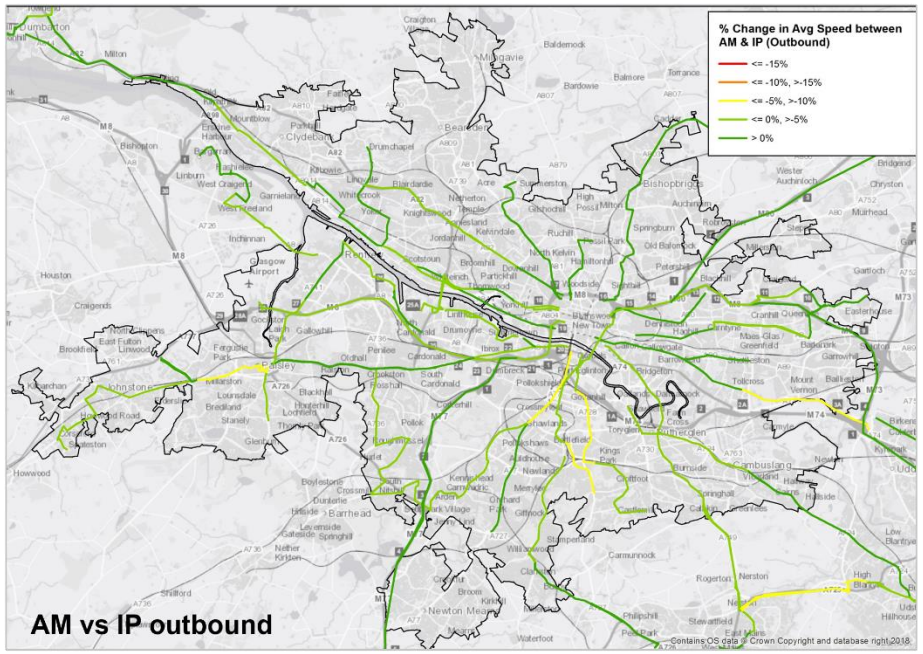
Figure 32: Bus Journey Time Differences – AM inbound (top) and PM outbound (bottom) compared to inter-peak period

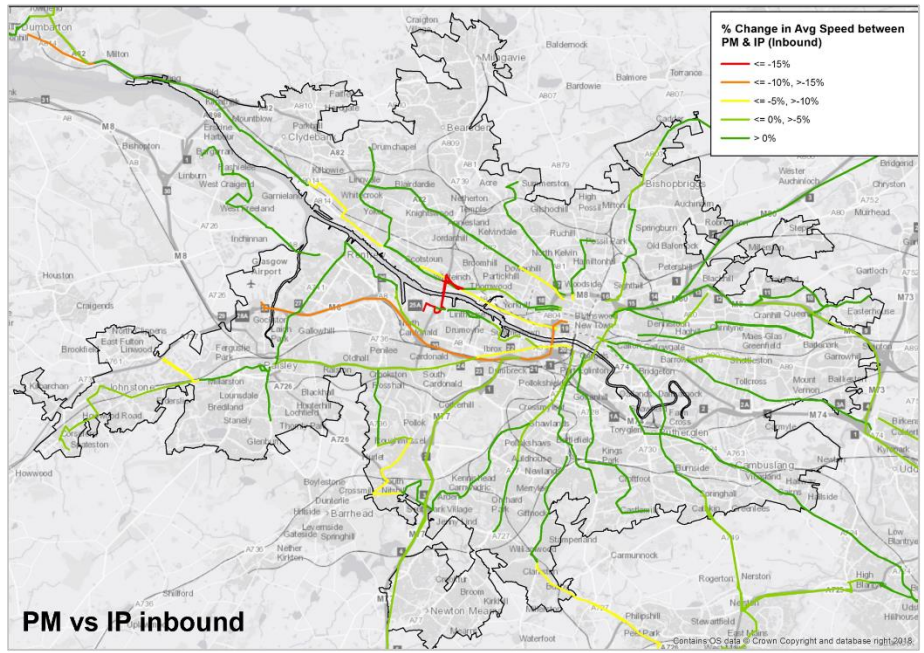
In the AM peak in the inbound direction, the greatest variation to the inter-peak was noted particularly upon the motorway network including M8, M77, M80, M74 and M73. Other routes that demonstrated high variability included the A803 in Bishopbriggs, Knightswood, A814 Dumbarton Road, A728 Aitkenhead Road, Gartloch Road and A74 / Hamilton Road at Mount Vernon. In the PM peak in the outbound direction, the greatest variation to the inter-peak was noted on the corridors similar to the AM inbound although on the M8 east of the city centre, M74, M73 and M80 the routes showed less variance in the PM peak than inbound during the AM peak. Outbound on the M8 west of the city centre, M77 and A728 Aitkenhead Road showed similar variance to inbound in the AM peak whilst the variance on A814 Dumbarton Road extended in the PM outbound direction to include the section between the city centre and Scotstoun.

Analysis of the RTPI data was also used to develop an understanding of the average bus speeds in the AM peak, inter peak and PM peak periods for both inbound and outbound buses. Comparison of the AM and PM peak period average bus speeds to the inter-peak average speeds is shown in Figure 33 for both the inbound and outbound directions.

Considering the AM comparison with the inter-peak, a number of routes into the city are slower than those out of the city reflecting the tidal nature of commuting flows. The only routes where this trend is not seen are in Johnstone and between Renfrew and Inchinnan. There is less variation between inbound and outbound speeds in the PM peak than the AM peak however, with average speeds largely remaining within the same thresholds. However, in the south-west of the city, the A761 Paisley Road West corridor to Johnstone and M8 between the city centre and Glasgow Airport are slower for inbound buses in the PM than for outbound travel. This is against the tidal flow, suggesting there is high demand for travel into or across the city from this area even when commuters are mainly flowing in the outbound direction. Around the rest of the city, routes in the PM peak generally follow the expected trend with slower speeds for outbound buses than for inbound buses.







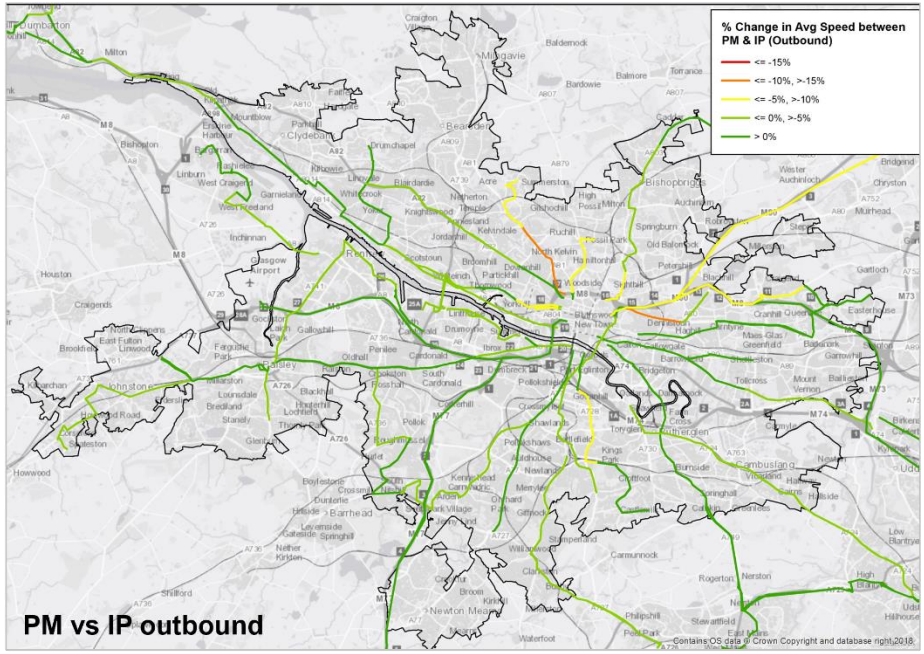


Figure 33: Bus Speeds – AM inbound (top, left), AM outbound (top, right) and PM inbound (bottom, left), PM outbound (bottom, right)

The downward spiral of bus decline that congestion can cause is well articulated in NTS2[32] (see Figure 34), where increased congestion ultimately makes the bus network less attractive leading to fewer passengers, increased fares and more cars on the network, further increasing congestion…and so the decline continues. It is clear that reducing congestion, or enabling buses to be prioritised and protected from the worst congestion on the network is important to breaking the circle of decline.

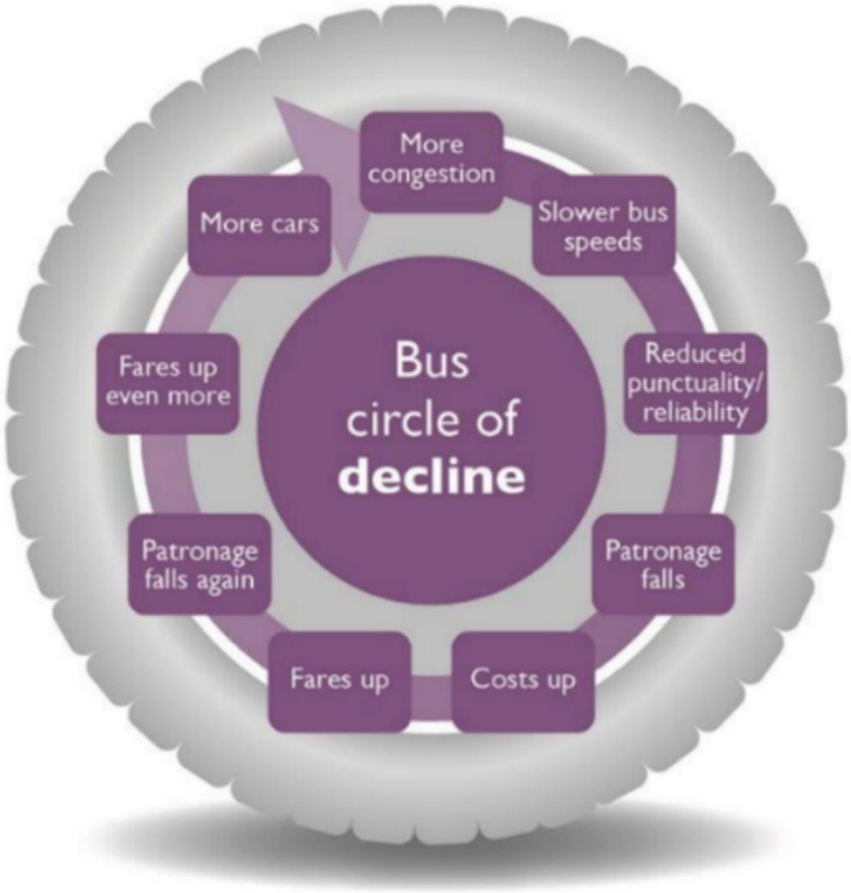


Figure 34: Bus Circle of Decline

Journey Time Comparison with the Car

Long journey times are often cited as a reason why people don't use the bus. To illustrate this, analysis of the differential between car and bus journey times has been undertaken, considering travel from large, medium and smaller towns / villages within each local authority area to Glasgow and to the large towns with each authority area. It is recognised that given the nature of many of these journeys that one or potentially two interchanges may be required.

The differences are shown in Figure 35 for travel at 8AM on a weekday.[33]

The analysis shows that (with just one exception), journey times by bus across the region are in most cases far longer than the equivalent journey time by car[34]. In many instances the bus journey time is more than double the car journey time, and frequently more than three times longer. This makes the **bus largely unattractive in terms of travel time when compared to the car across most of the region**. For these trips, bus is therefore very unlikely to be used by those who have access to a car.

Investment in Bus Network Infrastructure

There has been considerable recent capital investment in infrastructure to support travel by bus within the region including:

- **Redevelopment and upgrading to regional bus stations including key projects at Kilmarnock, Partick, Govan, and Hamilton**. The £4 million refurbishment of Kilmarnock bus station will be completed in 2024, resulting in reconstructed waiting facilities, a ticket counter, and Shopmobility office, a new Changing Places facility, improved footway linkages and improved signage, Real Time Information at each stance, and refurbishment of the station concourse itself including the roof and entrance. The £2.5 million redevelopment of Partick bus station/interchange was completed in 2018 and resulted in increased bus stances, enhanced waiting facilities that fully integrate lighting, CCTV, seating and customer information technology, and improved pedestrian access. The £7 million upgrading of Govan Interchange (including Govan Subway station and bus station) completed in 2016 resulting high quality sheltered passenger waiting areas with improved lighting, CCTV, seating and customer information technology, as well as improved pedestrian areas around the bus station. The £5.5 million bus station redevelopment at Hamilton completed in 2013 and included the construction of a new control building, boarding stances, a tour lounge, and fully covered boarding, shelter and walkway areas, as well as the provision of state-of-the-art information screens and signage.

[32] National Transport Strategy 2 | Transport Scotland

[33] Analysis undertaken using Google API

[34] Exceptions to this are between smaller town / village in Argyll & Bute and Inverclyde and North Ayrshire where the Gourock-Kilcreggan ferry means the differential is reduced (assuming use of the ferry as part of the public transport trip)

- **Fastlink**, which utilises segregated bus lanes and priority signalling to provide faster and more reliable bus journey times between Glasgow city centre and the Queen Elizabeth University Hospital, as well as to other key developments along the Clyde Waterfront. Fastlink was funded by Scottish Government of up to £40 million in investment

- **Real time passenger information**. SPT's updated regional RTPI system commenced operation in 2016. Since then, approximately 400 new signs have been installed across the region, bringing the total number of electronic signs in place to 850. These provide live service departure information for the four main local bus operators, four smaller operators and two Community Transport operators, while also linking to the Traveline Scotland online journey planner and Glasgow City Council's traffic control system. Notable amongst recent expansions of on-street RTPI installations have been Renfrewshire (now totalling 65 signs), East Dunbartonshire (60 signs), the first 6 on-street RTPI installations in North Lanarkshire and the first ten on-street RTPI signs in Inverclyde. Further expansions during 2023 is taking place in East Renfrewshire, South Lanarkshire and East Dunbartonshire.[35] In addition, following successful roll-out of RTPI at Govan and Partick Bus Stations, RTPI provision at Buchanan Bus Station was upgraded in 2021. RTPI at Greenock and Hamilton Bus Stations was upgraded during 2022/23 and similar improvements at East Kilbride Bus Station are currently underway[35]

- **Improvements to bus stops** SPT and local authorities, using SPT capital grant funding, work together to upgrade bus stops across the region including shelters, high access kerbs, safety and accessibility improvements to walking routes to bus stops, and travel information. Around £17 million in capital funding was invested by SPT in improvements to bus stops and routes to bus stops between 2018/19 – 2022/23

- **Bus priority including Traffic light priority (TLP)** to speed up buses at signals. Around 140 junctions in Glasgow are now enabled to provide TLP for bus. SPT has, in recent years, provided capital funding to enable TLP to be rolled out across other Local Authority areas. To this end, 12 junctions in North Ayrshire between Irvine and Kilwinning have been enabled for TLP and are now in operation. Twelve junctions in the Renfrewshire Council area are now active, with more to follow and one junction in East Ayrshire has been enabled. In South Lanarkshire Council area, 40 junctions now have active TLP in operation in the Hamilton, Blantyre, Cambuslang and Rutherglen areas, with more to follow in future years. SPT has invested around £6 million towards projects that support bus priority between 2018/19 – 2022/23. SPT is also working in partnership with local authorities and operators to deliver the Bus Partnership Fund in the region, with Glasgow City Council leading on the development of business cases for significant investment in five key bus corridors with additional corridors to be progressed in future.

It is worth noting that **passenger numbers and the commercial bus network continue to reduce despite this considerable investment**.

Key Points:

- The commercially operated bus network is reducing and publicly funded intervention is increasing
- The existing network limits its use both by those with no access to the network, and through limited evening and Sunday services
- Congestion on the network has an impact on bus journey times, which contributes to increasing operating costs and making bus less attractive to passengers
- Bus journey times across most the region are far longer than those by car
- Passenger numbers and the commercial bus network continue to reduce despite considerable investment in bus network infrastructure

[35] ops280423_agenda7.pdf (spt.co.uk)

			Larger Cities / Towns										
			East Dunbartonshire	North Lanakshire	South Lanakshire	East Renfrewshire	Renfrewshire	West Dunbartonshire	Inverclyde	Argyll & Bute	North Ayrshire	East Ayrshire	South Ayrshire
		Glasgow	Kirkintilloch	Kilsyth	East Kilbride	Newton Mearns	Paisley	Clydebank	Greenock	Helensburgh	Irvine	Kilmarnock	Ayr
	Glasgow	0%	176%	217%	214%	229%	255%	172%	166%	192%	228%	162%	164%
Larger Cities / Towns	East Dunbartonshire	151%	0%	214%	266%	244%	276%	311%	205%	205%	254%	217%	215%
	North Lanakshire	225%	199%	0%	369%	285%	309%	315%	236%	278%	260%	231%	242%
	South Lanakshire	245%	297%	401%	0%	379%	344%	272%	251%	249%	390%	344%	311%
	East Renfrewshire	233%	265%	322%	318%	0%	330%	233%	222%	229%	249%	165%	253%
	Renfrewshire	207%	247%	290%	314%	342%	0%	400%	279%	320%	185%	263%	243%
	West Dunbartonshire	198%	257%	282%	252%	290%	377%	0%	392%	214%	292%	209%	206%
	Inverclyde	167%	203%	213%	247%	258%	271%	438%	0%	321%	268%	215%	189%
	Argyll & Bute	198%	244%	216%	258%	246%	354%	243%	224%	0%	293%	228%	242%
	North Ayrshire	215%	245%	255%	391%	251%	208%	320%	283%	276%	0%	251%	272%
	East Ayrshire	175%	213%	206%	413%	208%	303%	237%	203%	215%	267%	0%	274%
	South Ayrshire	188%	227%	250%	337%	258%	258%	229%	218%	238%	272%	253%	0%
Medium Towns	East Dunbartonshire	190%	192%	305%	276%	255%	281%	430%	237%	328%	262%	231%	226%
	North Lanakshire	358%	315%	476%	376%	287%	272%	292%	239%	262%	333%	223%	241%
	South Lanakshire	160%	213%	315%	208%	293%	260%	245%	199%	248%	350%	318%	314%
	East Renfrewshire	258%	292%	310%	410%	287%	375%	261%	256%	282%	438%	387%	392%
	Renfrewshire	222%	264%	290%	325%	333%	253%	489%	277%	380%	376%	231%	257%
	West Dunbartonshire	235%	277%	284%	286%	310%	193%	363%	352%	285%	326%	251%	241%
	Inverclyde	248%	265%	237%	312%	330%	242%	518%	234%	329%	396%	279%	245%
	Argyll & Bute	242%	275%	301%	275%	280%	379%	332%	165%	150%	309%	245%	268%
	North Ayrshire	173%	235%	214%	272%	293%	230%	385%	229%	269%	244%	278%	315%
	East Ayrshire	225%	247%	267%	341%	231%	310%	265%	232%	251%	309%	254%	337%
	South Ayrshire	228%	249%	264%	324%	291%	273%	251%	232%	235%	245%	285%	215%
Smaller Towns / Villages	East Dunbartonshire	256%	300%	195%	350%	334%	292%	435%	296%	299%	284%	226%	235%
	North Lanakshire	213%	367%	427%	384%	345%	324%	351%	279%	294%	292%	268%	276%
	South Lanakshire	199%	240%	315%	225%	250%	264%	231%	224%	234%	272%	248%	259%
	East Renfrewshire	266%	265%	268%	263%	211%	313%	393%	352%	327%	750%	392%	380%
	Renfrewshire	250%	305%	272%	338%	337%	226%	535%	483%	375%	282%	243%	338%
	West Dunbartonshire	204%	318%	369%	290%	296%	395%	287%	397%	408%	308%	236%	250%
	Inverclyde	178%	206%	214%	236%	245%	254%	346%	208%	207%	259%	269%	257%
	Argyll & Bute	222%	252%	251%	262%	258%	295%	257%	93%	134%	196%	205%	200%
	North Ayrshire	257%	293%	270%	347%	293%	257%	393%	219%	317%	280%	275%	269%
	East Ayrshire	219%	252%	248%	478%	313%	357%	236%	230%	235%	152%	278%	265%
	South Ayrshire	227%	245%	248%	305%	285%	259%	248%	236%	247%	252%	271%	240%

Figure 35: Bus to car journey time differential (for travel at 8am, 2023 Google API data)

FARES AND TICKETS

Fares

At UK level, the relative cost of travel has risen more than travel by train and by car over a long period of time, as shown in Figure 36[36]. Furthermore, the cost of travel by bus has risen significantly more than the Retail Price Index and average wage increases over this time period.

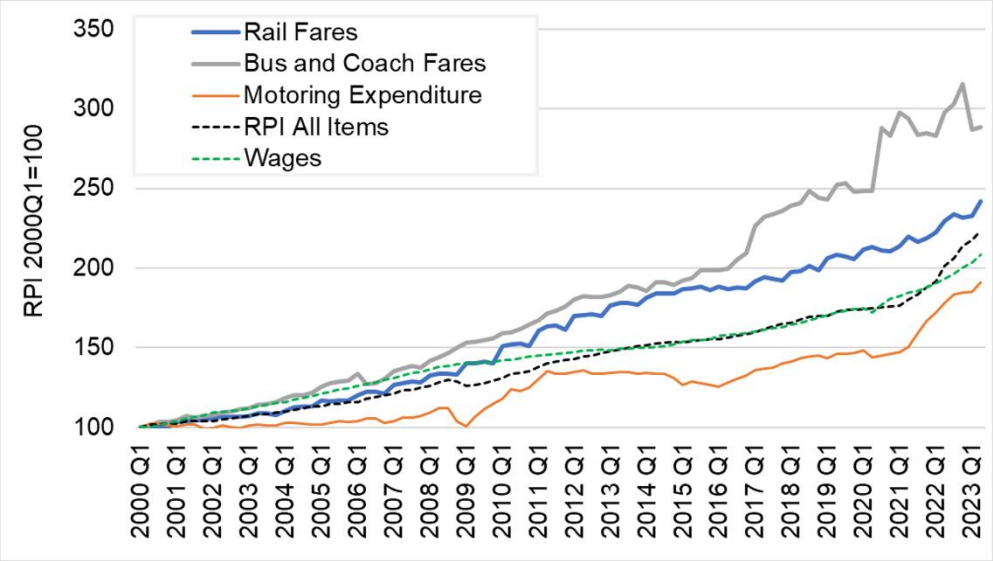


Figure 36: Relative Cost of Travel (2000 Q1 – 2023 Q2, indexed against 2001 Q1 figures)

In Scotland, between 2004/05 and 2021/22, whilst bus fares have increased by 88%, this has largely reflected increasing operating costs per bus-kilometre which have increased by 98% (both in current prices). Similarly, and reflecting the reduction in passenger numbers, the operating cost per passenger has increased by 215% over this period (in current prices).[37]

Between 2005 and 2020, while passenger journeys across Scotland fell by 24%, fares increased by 30% in real terms.[38] This is not to suggest that fares increases were entirely responsible for the decline in passenger journeys, but rather to evidence the circle of bus decline discussed above and its impacts.

In terms of the affordability of fares in the region, for people and households with lower incomes, the cost of public transport represents a very significant proportion of their income, especially when it is recognised that affordable housing is often located in peripheral locations generating a need to travel significant distances to access services and employment. This is compounded by the fact that low-income individuals and households cannot access the cheapest form of transport (car) because they are often unable to meet the upfront purchase costs.[39]

Concessionary Fares

The Scottish National Concessionary Travel bus scheme was introduced in April 2006 and is administered by Transport Scotland. The Scottish National Entitlement Card (NEC) provides free bus travel for disabled people plus anyone aged 60 or over. The Young Persons' (Under 22s) Free Bus Travel Scheme provides free bus travel for people aged under 22 years.

Concessionary travel on the Scottish network was broadly flat in the decade prior to the COVID 19 pandemic. However, the reduction in overall passenger numbers means that between 2006/7 and 2021/22 the proportion of concessionary passengers on the bus network rose from approximately 33% to around 38%, as shown in Figure 37.[40]

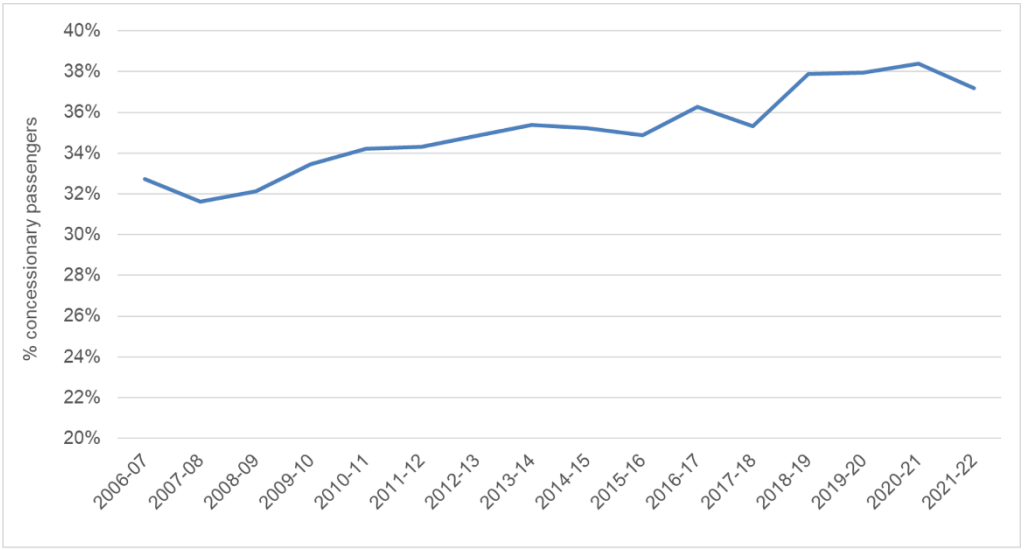


Figure 37: Concessionary bus travel as a percentage of all bus travel (2006/7 – 2021/22)

[36] Office for National Statistics
[37] Scottish Transport Statistics, Tables 2.5, 2.6 and 2.7
[38] Glasgow & Strathclyde Transport Act Scoping Study, Options Assessment Study, Final Report, SYSTRA
[39] Glasgow & Strathclyde Transport Act Scoping Study, Affordability of Public Transport, SYSTRA
[40] https://www.transport.gov.scot/publication/scottish-transport-statistics-no-41-2022-edition/chapter-2-bus-and-coach-travel/

There is no published data for concessionary travel use disaggregated below Scotland level but based on published data and the level of reimbursement to operators in the SPT region, it has been estimated that approximately 49% of concessionary travel journeys are undertaken in Strathclyde, equivalent to circa 68 million journeys in 2019/2020 and implying around 80 million fare-paying passenger journeys in the same period[41].

It is important to note that the NEC allows for free travel on the bus network only. While the card can be used to obtain a discounted fare on the rail network, it does not enable free travel. Therefore, the concession is not able to be equally used across the region and provides greatest benefit to those with good access to the bus network.

Due to the process used by Transport Scotland to reimburse bus operators for the carriage of passengers holding a NEC pass, there is evidence that any policy to reduce fares for full paying passengers may be problematic.[42] The fact that operator reimbursement for concessionary travel is based on a fixed percentage of the average single adult fare foregone for the journeys made may distort market forces which would otherwise link the level of adult fares with total demand.

It is worth noting that the Scottish Government has commissioned a Fair Fares Review[43,44] to ensure a sustainable and integrated approach to public transport fares as Scotland recovers from the COVID 19 pandemic. The review is looking at the range of discounts and concessionary schemes which are available on all modes including bus, rail and ferry. It is also taking into account the cost and availability of services, and considering options taking cognisance of the relative changes to the overall cost of travel.

Ticketing

With approximately 40 operators providing services across the region, the structure of fare products is complex with users needing to select from single and multi-operator products covering a range of different zones as defined by individual operators. It is recognised that whilst the wide range of tickets available will in many cases be beneficial to regular bus users who may as a result be able to get a near-bespoke ticket which meets their needs, the level of complexity within and across different operators is likely to be a deterrent to infrequent bus users or visitors to the area.

To illustrate this, the tickets offered by the three main operators providing services in the region are shown in Figure 38. The three main multi-operator tickets are shown at the top, with the differing ticket types, ticket lengths, and varying geographical areas within which the tickets are valid noted below. As suggested previously, this

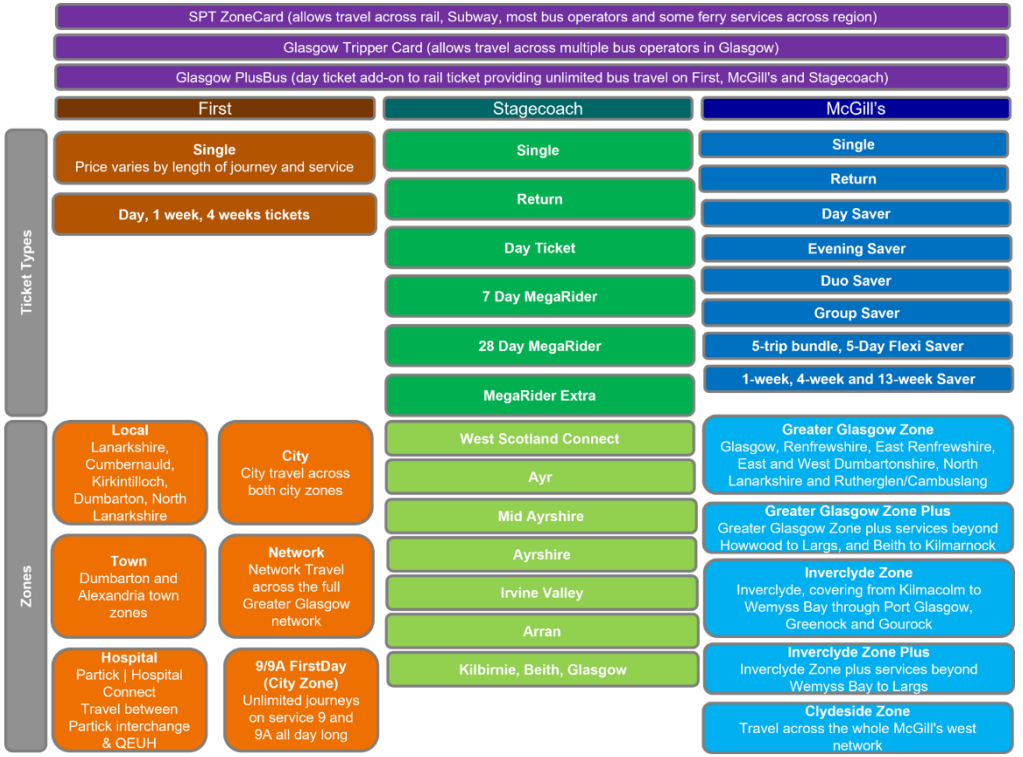


Figure 38: Illustration of complex ticketing across the region (across the three main operators)

array of ticketing and their varying geographical coverage creates a highly complex structure for the bus user to navigate, adding difficulty to determining the best value for money for their trip. The separate retailing of tickets (e.g. different operator-own digital platforms for ticket purchasing), the different availability in terms of what ticket types can be purchased as on-board sales, the different payment methods used across the operators (i.e. some give on-board change, some not), and the different pricing for electronic and on-board tickets all add to the complexity of ticket purchasing for passengers across the region.

Key Point

The relative cost of travel by bus has risen more than other modes, with a lack of fares integration, and ticketing complexity.

[41] Glasgow & Strathclyde Transport Act Scoping Study, Affordability of Public Transport, SYSTRA
[42] Glasgow & Strathclyde Transport Act Scoping Study, Options Assessment Study, Final Report, SYSTRA
[43] Our Actions for 2022 - 2023 | Transport Scotland
[44] Responding to the climate emergency - Scottish Government and Scottish Green Party: draft shared policy programme - gov.scot (www.gov.scot)

COMPETITION

Predominantly, private sector bus operators plan and operate local bus services which are registered with the Traffic Commissioner of Scotland. Operators can compete for passengers 'on street', seeking to differentiate themselves by the quality of service offered and fares available.

As of Autumn 2023, while there are approximately 40 operators providing services within the region, three main operators operate over 80% of all bus mileage: First (41%), Stagecoach (19%) and McGills (21%).[45]

Most local authorities have a dominant operator, with First predominantly operating services in Glasgow and Lanarkshire, Stagecoach covering Ayrshire (North, East and South) and McGills operating the majority of services across Inverclyde and Renfrewshire (as shown in Figure 40 and Figure 41 below). The only local authority area without a dominant operator is East Renfrewshire where services are operated by all three of the major operators.

Furthermore, mapping of the number of operators serving each bus stop across the region, as shown in Figure 39, shows that **63% of bus stops are served by a single operator**, illustrating that people who are served by these stops do not directly see the envisaged benefits of on-street competition.

The coverage of the operators can be seen Figure 42 and Figure 43 which follow with Figure 40 showing the three main operators (with all other operators as a single colour), and then with Figure 41 showing the three main operators as a single colour (grey) and all other operators individually identified.

It can be seen that gaps in the main three operators' network are filled by the small operators covering a local 'patch'. These operators are often locally based in the communities they serve.

The deregulated bus market (enabled through the Transport Act 1985) was set up to promote competition and ensure greater passenger choice with the anticipation that competition would incentivise operators to keep costs down, lower fares and provide services which customers want. Considering the dominance of the three major operators across much of the region, and with the majority of bus stops only served by a single operator, there is a lack of competition in terms of services, and fares (and by extension affordability) across the region. Where some competition does exist, predominantly on some of the main routes into Glasgow (e.g., Pollokshaws Road, Great Western Road, Paisley Road West etc.) it is clear from the *Frequency of bus services by stop* mapping above that some routes can have in excess of 10 calls per hour, so there is potentially evidence of 'overprovision' where operators compete and therefore a less efficient use of resources.

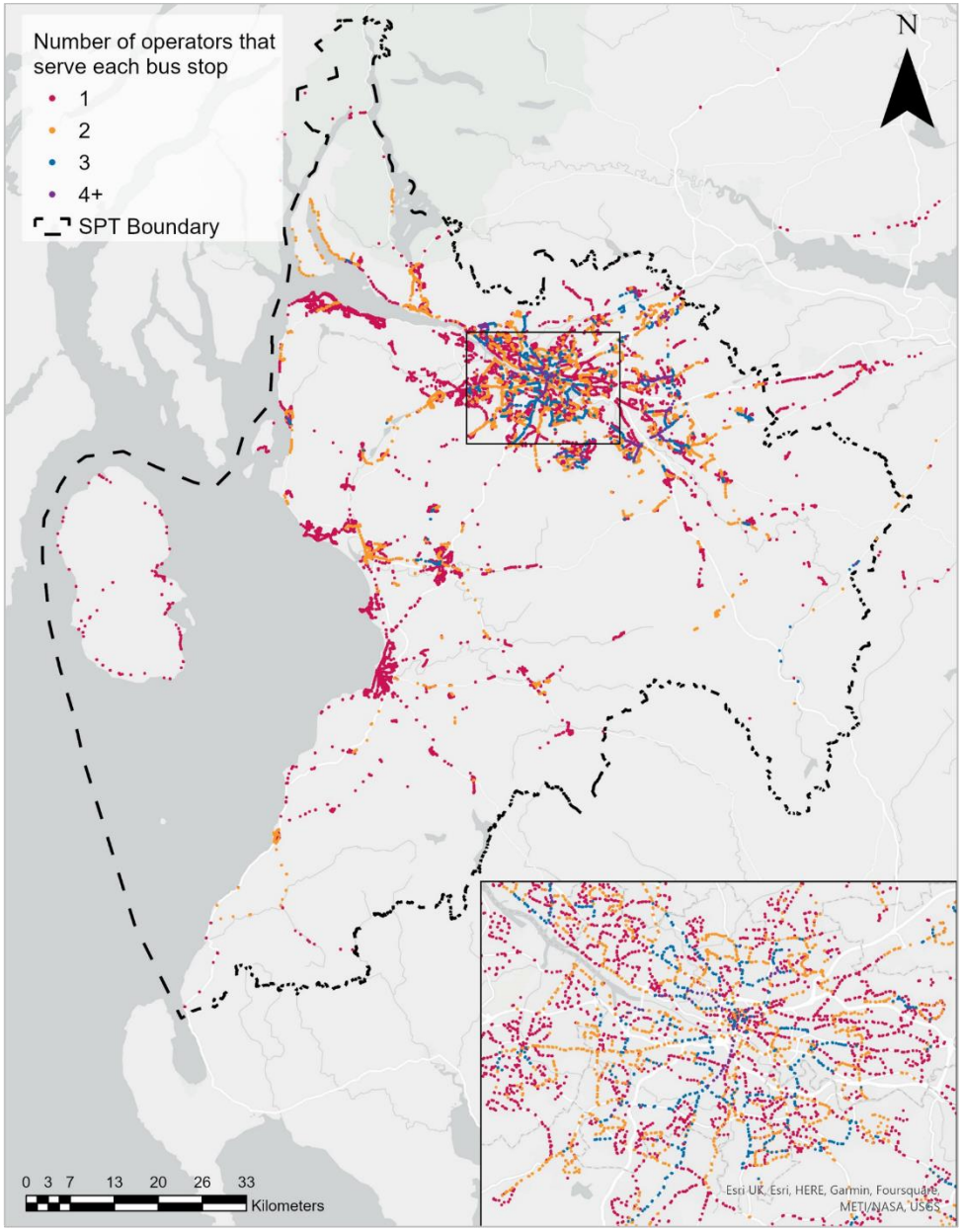


Figure 39: Number of operators serving each bus stop

[45] SPT

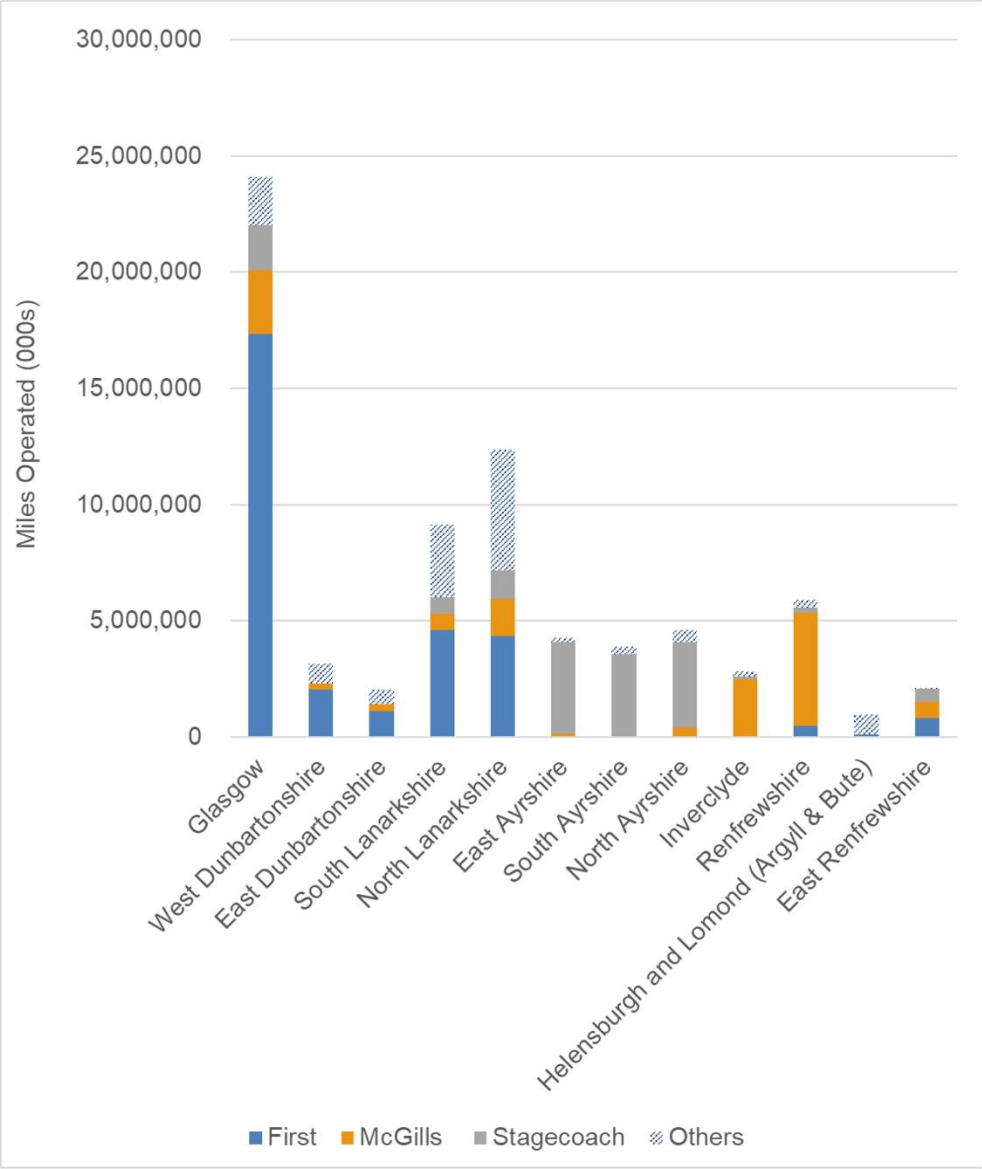


Figure 40: Miles operated by operator within local authority areas (absolute)

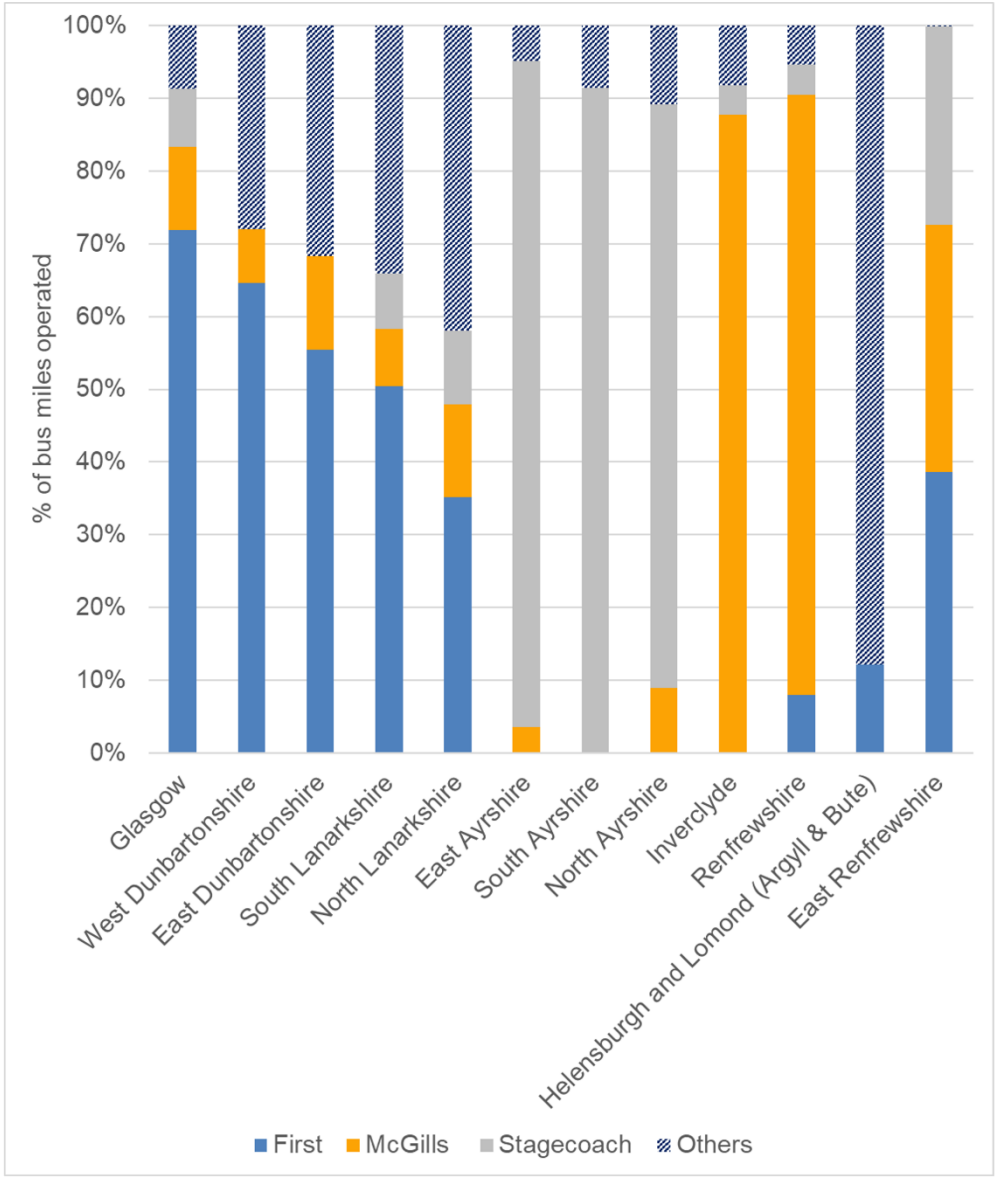


Figure 41: Miles operated by operator within local authority areas (percentage)

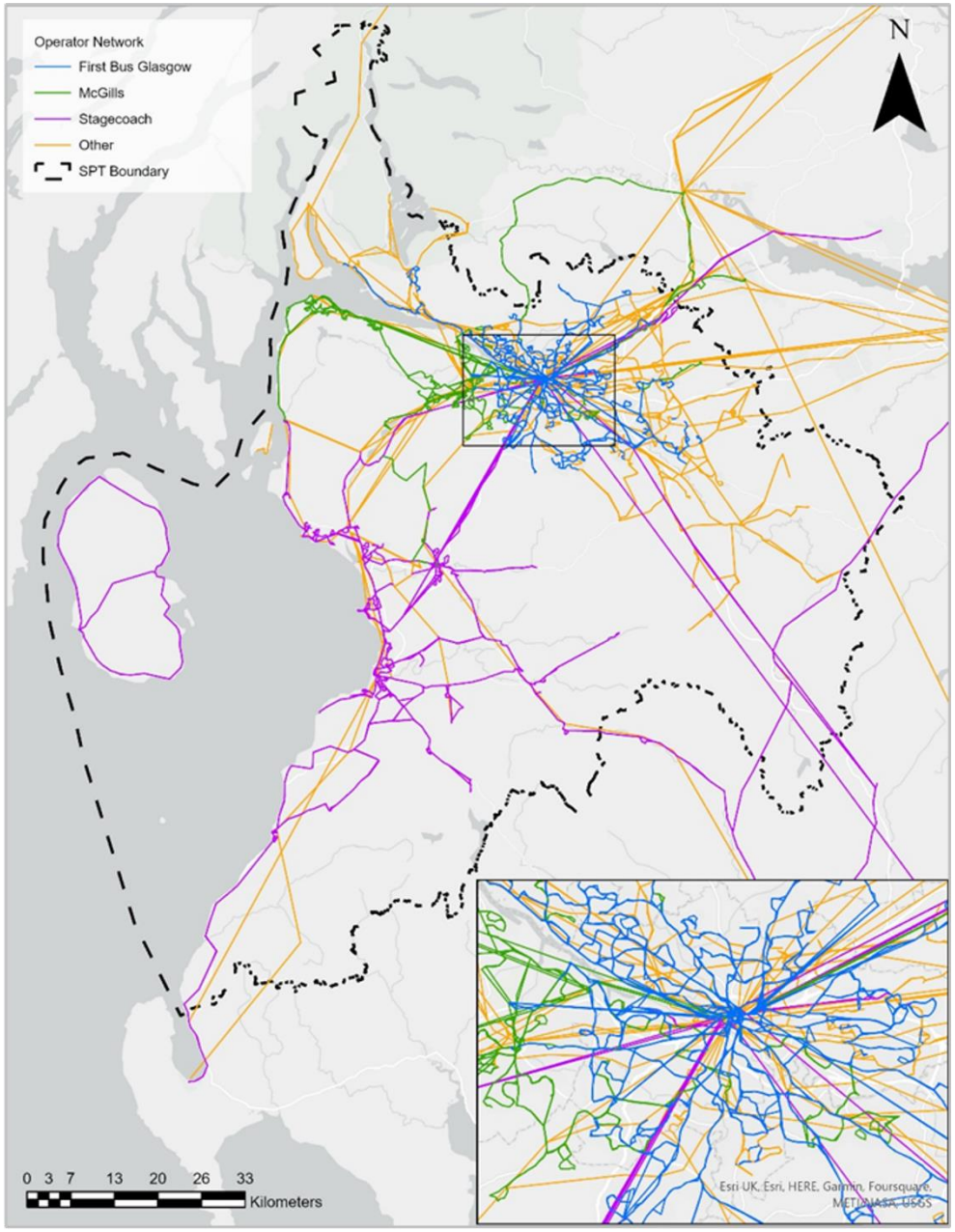


Figure 42: First, Stagecoach and McGills bus networks

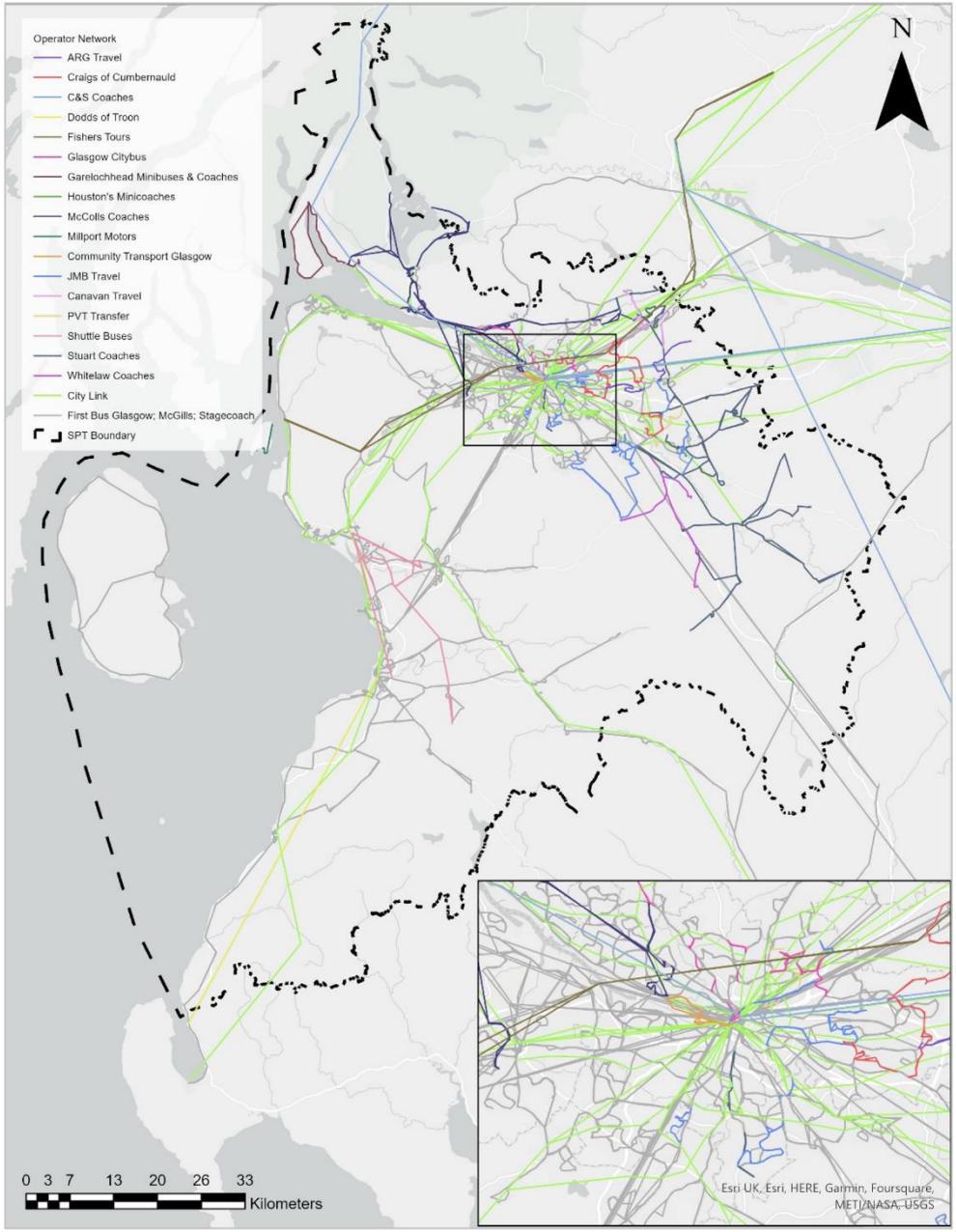


Figure 43: Smaller Operator Networks

Competition from Rail

There has been significant growth in the Glasgow Suburban rail network since 1990 with the expansion of services and the electrification of lines:

- The **Argyle line** (serving the commercial and shopping districts of Glasgow's central area and connecting to towns from West Dunbartonshire to South Lanarkshire) saw significant improvement in 2005 as it was extended with the Larkhall line with new stations at Chatelherault, Merryton, and Larkhall. In 2022, there was a further £32m improvement to the Argyle line to improve reliability for passengers through the repairing and replacement of tracks as well as the modernisation of Anderston station.[46]
- The **Maryhill Line** (linking central Glasgow and Anniesland via Maryhilll) was reopened in 1993[47] and then in 2005 it was extended to provide a link from Anniesland to central Glasgow, via a new station at Kelvindale[48].
- In 2010 the **North Clyde Line** was extended from Airdrie by reopening the line to Bathgate with a new station at Caldercruix, and since 2014 the Cumbernauld Line, which links Glasgow to Falkirk, has been an extension of the North Clyde network.
- The **Paisley Canal Line** resumed its passenger service in 1990 between Glasgow Central and the Paisley Canal station.[49].
- The **Whifflet Line** was re-opened for passenger services in 1992 by British Rail[50], which ran to the newly built Whifflet station.
- Other **new stations** since 2000 include Howwood, Gartcosh and Robroyston
- More than 3,000 **additional rail Park & Ride spaces** have been constructed across the region since 2007/8

There has also been a large amount of investment into the electrification of the Glasgow commuter rail lines, including a £49m investment into the **Shotts line** (linking Glasgow Central and Edinburgh Waverley via Shotts) as part of the Scottish Government's investment into links between Scotland's largest cities.[51].

Further investment is also underway, including the electrification of the East Kilbride line[52] and redevelopment of Hairmyres Interchange in East Kilbride (including a Park & Ride site). Furthermore, investment is being made through the Rail Services Decarbonisation Plan[53] including to electrify the Glasgow to Barrhead route to enable greener trains to operate.

While improving the attractiveness and reliability of rail services through expansion of services and electrification has contributed to the increase in rail patronage levels, these extensive improvements to the Glasgow suburban rail network over the last 30 years, as well as ongoing investment, have increased modal competition with the bus.

Competition from Taxis

The use of taxis and other private hire vehicles as an alternative to travel by bus was noted during consultation with local authorities during the development of this Case for Change (with this engagement discussed further in a later section). Taxis were noted to be preferred by some on the grounds of both cost and accessibility, especially where bus service frequencies were more limited. Taxis were noted to often be considered cheaper than travel by bus particularly if travelling as a group or family, and provided the direct connectivity required. This was noted particularly by a few local authorities where the topography of the area was understood to be a factor in the use of taxis if access to the nearest bus stop involved a considerable uphill or downhill walk.

Key Points

The deregulated market is set up to promote competition and ensure greater passenger choice but there is a lack of competition across much of the region. Where competition does exist, bus volumes potentially can be excessive and therefore inefficient, and extensive improvements to the Glasgow suburban rail network over the last 30 years have increased modal competition for the bus.

USER EXPERIENCE AND PASSENGER SATISFACTION

Satisfaction amongst the general public with bus services has decreased over the last decade, down from 75% in 2012/13 to 68% in 2019/20.[21] This increased slightly in 2021/22 to 72% although again this figure reflects a time when the network was still in a COVID recovery phase.

The Scottish Household Survey asks bus users about whether they agree with a range of statements about their bus services, and the results from 2021 for the Strathclyde region (as a whole) are shown in Figure 44.

For all aspects except safety and security during the day, ticketing simplicity and service information, agreement with the statements was less than 80%. Less than half of bus users agreed that fares are good value or that their buses are environmentally friendly.

[46] £32m Argyle Line improvement works set to begin | ScotRail
[47] RAILSCOT | Glasgow, Dumbarton and Helensburgh Railway
[48] scot-rail.co.uk » Maryhill Line
[49] RAILSCOT | Paisley Canal Line
[50] RAILSCOT | Whifflet
[51] Network Rail awards £49m Shotts Line electrification contract (networkrailmediacentre.co.uk)
[52] https://scotlandsrailway.com/projects/east-kilbride-enhancements
[53] https://scotlandsrailway.com/projects/barrhead-glasgow-electrification

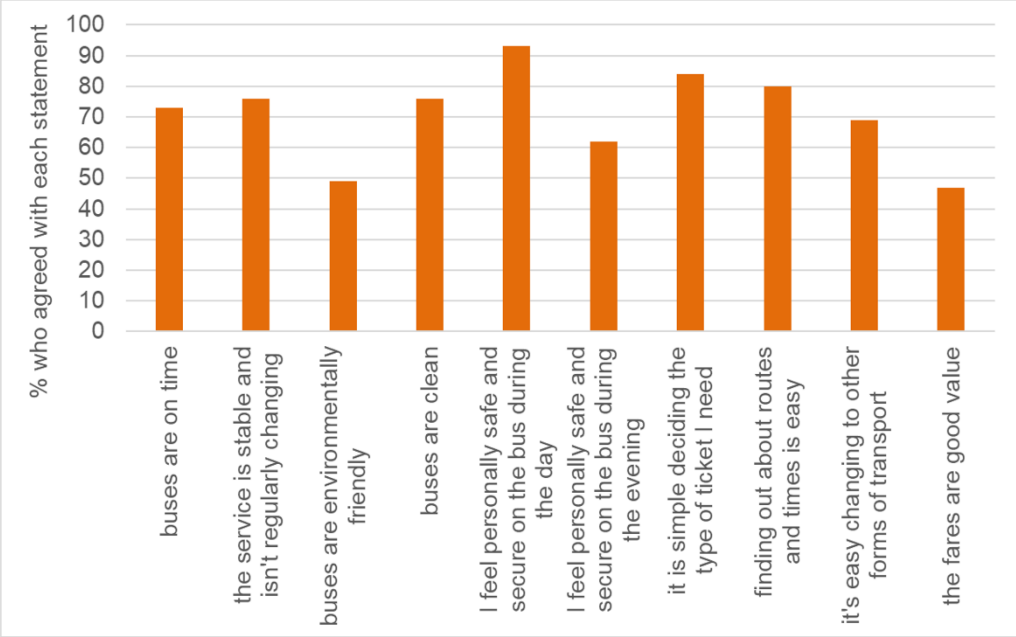
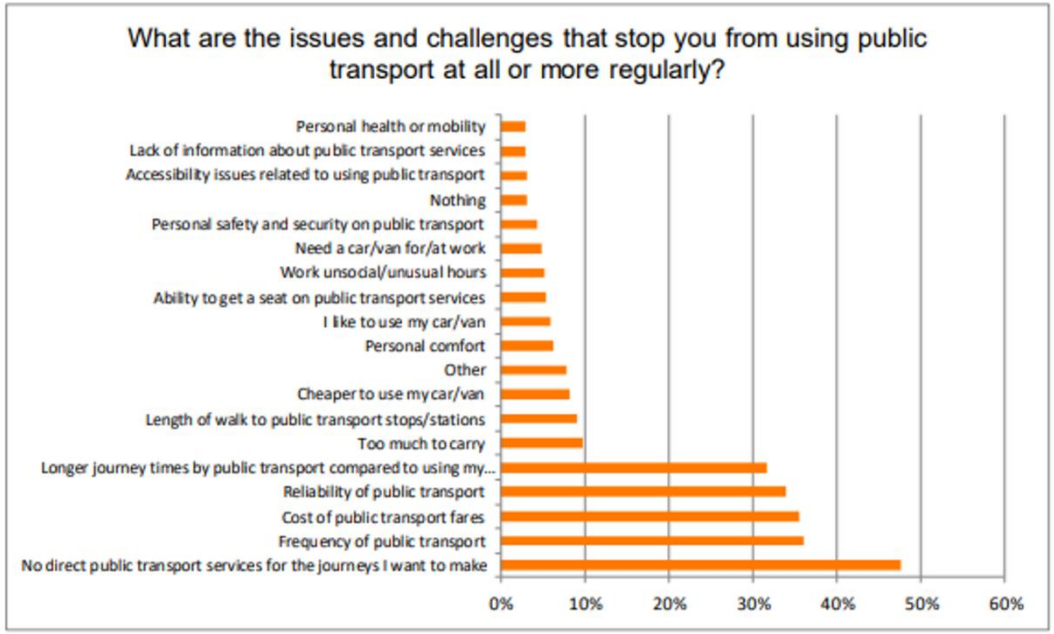


Figure 44: Adults (16+) in Strathclyde who used a local bus services in the past month, percentages who agreed with each statement (Scottish Household Survey 2021)

The data is disaggregated to local authority level (although it should be noted the sample size by local authority is often 100 or less, with only Glasgow with a larger sample size at 330) and highlights specific local authorities where the survey results show a lower level of agreement with the statements compared to both the Scotland-wide and indeed Strathclyde averages. This indicates lower satisfaction with local bus services in certain areas. Those in West Dunbartonshire, East Renfrewshire and Glasgow tended to agree less with many of the statements compared to the Scotland-wide averages. This is particularly noted in terms of agreement with the statement '*buses are environmentally friendly*' and '*I feel personally safe and secure on the bus during the evening*'. Those in East Dunbartonshire, North Ayrshire and Renfrewshire agreed less with the statement '*the fares are good value*'.

Engagement with the region's residents undertaken during the development of the RTS asked what the issues and challenges were that stopped people from using public transport. As shown in Figure 45 (top graph), the most noted response was the lack of direct services, followed by service frequencies, the cost of fares, reliability, and the longer journey time compared to the same trip by car. Reflecting this, the things which were noted that would encourage modal shift from the car were, as shown in the Figure 45 (bottom graph), more suitable services, faster public transport journeys, improved frequency of services and service reliability and more direct services (such measures are discussed in the following chapter).



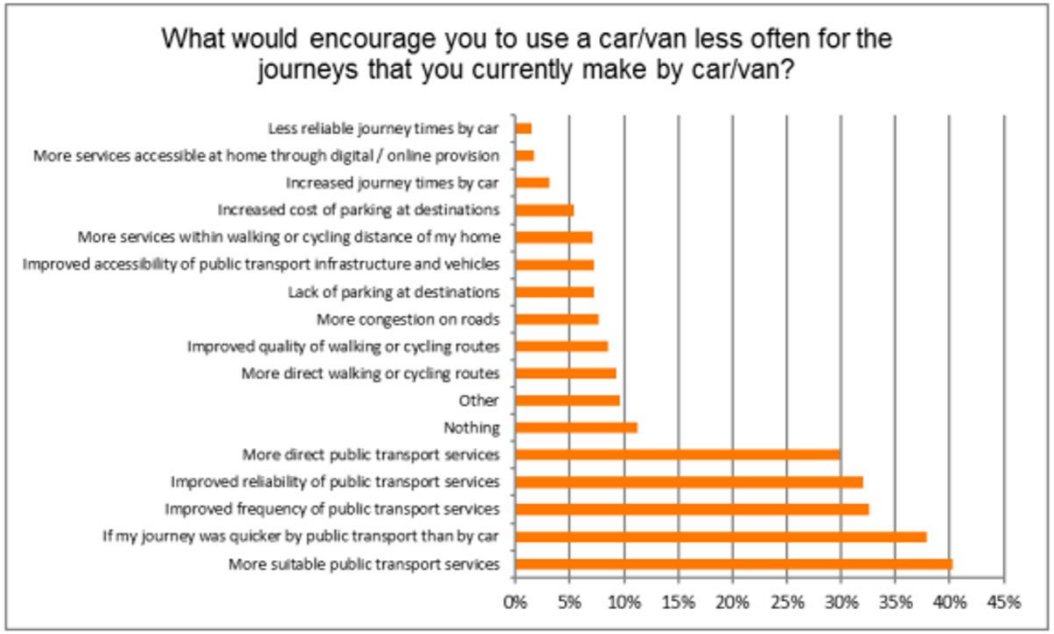


Figure 45: Public Responses to RTS Case for Change Engagement

Consultation undertaken during development of the RTS focussed around five main themes: transport emissions, access for all, regional connectivity, active living and public transport quality and integration. Across these themes, the public transport quality and integration was, of the five key themes, noted of high importance to the greatest percentage of respondents, with respondents noting the importance of:

- transport integration across all modes
- a high-quality transport system that is attractive to use,
- affordable transport
- integrated ticketing
- reliable, frequent services and integrated services

The RTS noted that the current public transport system in the region suffers from poor perceptions by the public, inconsistent performance, and a lack of integration between different modes and operator networks, services and tickets. Furthermore, the RTS notes that satisfaction with local public transport services in the region has been decreasing and about half of all passengers feel that public transport does not offer value for money.[54]

Stakeholder feedback gathered during the Connecting Communities 'Public Conversation' on Glasgow's transport future in 2020 noted the top transport problems mentioned in responses included[55,56]:

- quality, reliability and connectivity issues with public transport (particularly buses
- high cost of public transport (particularly buses)
- lack of integration in the public transport system including ticketing

Furthermore, it was noted that:

- there is a lack of affordable integrated ticketing options between operators in the region
- the public have a lack of faith in the reliability of bus services
- passengers do not consider bus a reliable alternative to car

ENGAGEMENT

The development of this Case for Change involved individual discussion with all 12 local authorities across the region and two engagement sessions with bus operators.

Local Authority Engagement

Discussion with local authority officers explored:

(i) the current bus network and its ability to serve local communities' needs

(ii) why people did or did not choose to use the bus

(iii) how well integrated services were with other modes of transport (including physical integration as well as ticketing and fares)

(iv) perceptions around fares affordability

(v) competitiveness with other modes

(vi) whether there were any specific reasons underpinning the decline in bus patronage in their areas.

A range of feedback was received and while this varied across local authorities, predominantly reflecting the urban and rural differences, some themes were consistent throughout. Some of the most pertinent issues discussed included: the poor public perception of the bus network; the erosion of passenger confidence due to service reliability issues - being exacerbated by the current driver shortage issues across the industry; the importance of bus travel for those in more deprived communities and the affordability of fares for these communities; and the increasing reliance on the bus given the ageing demographic. Some authorities noted the preference by residents to use taxis instead of the bus with cost, service frequency and also topography noted as the rationale for this.

In some areas it was noted that bus and rail compete directly, whereas in others they offer complementary roles for different user needs, e.g., interurban versus local travel. Most local authorities noted the need for better integration, with some areas actively pursuing integration schemes. Active travel integration was also seen as important but the need to provide roadspace for both bus and active travel infrastructure was recognised as a challenge.

A number of local authorities noted:

- the lack of control they had over bus services, with often limited knowledge of upcoming changes in services within their area

[54] Regional Transport Strategy | SPT | Strathclyde Partnership for Transport
[55] Glasgow Integrated Transport Assessment, Stage 1 Report, August 2021
[56] Connecting Communities - Glasgow City Council

- that obtaining operators commitment to operate services (either to serve new developments, or where the council had invested in infrastructure) was not always easy
- that council's often lack evidence from operators of the reasons for service withdrawal.

The lack of control over the bus network was felt to lead to an inability to use public transport as a policy tool in their areas. Particularly outside of Glasgow, it was also felt that local authorities cannot use the same policy levers, for instance through parking control measures, to encourage modal shift and use of the bus network.

Officers also noted the benefits of – and in some cases, a need for – a collaborative approach to delivering improvements to core elements of service, such as ticketing and information. A regional level approach to working was cited frequently. In addition, the need for bus planning to be better embedded in the development planning process from an early stage was noted.

It was noted that the majority of local authorities work collaboratively with operators on an informal or voluntary partnership basis, including collaboration on opportunities such as the Bus Partnership Fund in some areas. The majority of local authorities expressed an interest in further exploration of the opportunities related to delivery and funding models, as per the Transport (Scotland) Act 2019, although a few expressed concern over their capacity to undertake this exploration independently.

Bus Operator Engagement

Two engagement sessions were held to discuss the emerging findings from the SRBS Case for Change with bus operators. All bus operators in the region were invited to the sessions and the three main operators -Stagecoach, McGills and First – attended.

While there was debate over how the data was presented and framed within this Case for Change, there was no disagreement that the data analysis was factual. The need to ensure that contextual background was accurately reflected was noted to be very important, especially around the issues of fares, journey time, and increasing operational costs, reflecting that this is often outwith operator control. The significant recent investment in the rail network and the competition this creates was also noted. This input from bus operators has been considered in the development of the Case for Change.

SUMMARY

The RTS concluded that the strategy Vision will not be achieved without improving the quality and integration of the bus network and it sets out a policy aiming for a world class passenger focused public transport system.

It is clear that bus has a major underpinning and multi-faceted role in the successful delivery of a range of transport, social, environmental and economic policy at national, regional and local levels.

However, while travel by bus needs to increase to help achieve policy aims:

- bus services and patronage are both in decline
- the commercial bus network is reducing
- there is an increasing burden on the public purse to provide necessary services
- the current bus network does not provide convenient bus access and services to people across some parts of the region

Congestion on the road network is a serious issue and one over which the operators have no control. Bus journey times across the region are almost always considerably longer than travelling by car, reducing the attractiveness of travel by bus and unfairly impacting on those for whom travel by car is not an option. Congestion impacts on operators ability to maintain service levels and operational speed, with congestion leading to increased journey times, difficulty adhering to timetable, as well as increasing operating costs. Ultimately, this leads to a cycle of fewer passengers and increased fares.

The relative cost of travel by bus has risen more than other modes, and the existing fares structure is complex with limited fares integration across operators and with other modes. While the deregulated market was set up to promote competition and ensure greater passenger choice, there is a lack of competition across much of region with most local authorities having a dominant operator and most bus stops in the region only served by a single operator.

CURRENT DELIVERY MODEL AND FUNDING: OVERVIEW

Legislative Context

The legislation that governs the operation of bus services in the region goes back several decades. Given the limited application of alternative models of bus service delivery options in the UK, although Scottish legislation differs in detailed aspects from its English counterparts, it is helpful to consider progress with reform throughout the UK.

Bus services were deregulated across the UK in 1986 by the Transport Act of 1985. Existing bus companies (predominantly municipally or nationally controlled) became open to competition, provided they could satisfy some basic operational and safety requirements and obtain an operating licence.

During the next decade, publicly owned operating companies were sold to the private sector, with some notable exceptions, such as Lothian Buses in Edinburgh. Many operations were sold to large multi-centred operators who through a period of coalescence formed four very large national operators – two of which, First Group and Stagecoach, operate in the region alongside a range of medium sized and smaller operators.

In England, the Transport Act 2000 was founded upon an ambitious Government vision for buses and made legislative provision for various kinds of partnership working between bus operators and local authorities that would realise that ambition. It was broadly replicated in Scotland through the Transport (Scotland) Act 2001. Formal voluntary partnership arrangements were permitted, subject to competition law considerations, and statutory quality partnerships were also permitted that could be used to restrict the use of various facilities (an interchange, a bus lane, a busway) to operators whose operations met defined quality standards. Several statutory partnerships were established in the SPT area under the 2001 Act including Paisley, Inverclyde, Glasgow Fastlink and Ayr-Prestwick.

These Transport Acts also made provision for the creation of a Quality Contracts Scheme, whereby local authorities could make a business case to assume control of networks and fares, suspending the commercial operating market and letting contracts for the provision of bus services on the road. Few local authorities considered this approach and when one authority in the North East of England did attempt to create a Quality Contracts Scheme it did not succeed.

The Transport (Scotland) Act 2019 (which received Royal Assent on 15th November 2019) enacted significant revisions to the 2001 Act, broadly in line with similar changes to English legislation on buses. The ability to create a voluntary partnership agreement remained and statutory quality partnership arrangements were replaced by a Bus Service Improvement Partnership (BSIP), which would place firm commitments to improve bus services and infrastructure on a legal footing. The quality contracts process was replaced by a revised Bus Franchising Scheme and for the first time since the 1985 Act, local transport authorities in Scotland were permitted to establish their own municipally owned bus operator.

The Transport (Scotland) Act 2019 therefore offers a range of partnership options on a voluntary and statutory basis, as well as options for local transport authorities to take greater control of bus service operations through creating a franchising scheme and/or establishing a municipally owned bus operation.

Transport Scotland has now confirmed that the commencement orders for Section 35-37 (Bus Service Improvement Partnerships) and Section 38 (Local Services Franchising) of the Transport (Scotland) Act 2019 will begin on 4th December 2023. This will formally allow these powers to be utilised in practice from that date. It is worth noting that substantive regulations are required for both BSIPs and franchising in order to give these powers full effect. These are due to be introduced in 2024 alongside the development of guidance to support the use of the powers.

Roles and Responsibilities

There are a range of differing roles and responsibilities surrounding the delivery of services in the region, with organisations having various roles and powers in relation to bus services and networks (summarised in Figure 46).

The network is ultimately governed by the **Traffic Commissioner of Scotland** who grants operating licenses and with whom all services must be registered. The Commissioner also sets minimum vehicle standards and they have the power to suspend or revoke operator licences if terms are broken. Their ability to restrict registered services are extremely limited provided that they meet certain (very limited) minimum standards. Local authorities themselves therefore have no powers or control to govern the operators or services available within their authorities.

As the national agency, **Transport Scotland** has responsibility for delivering on the National Transport Strategy 2 and its policy objectives as well as administering grant funding (discussed below) including the reimbursement of concessionary travel schemes. They also operate and maintain the trunk road network and any bus related infrastructure as part of that network, but again has no control over bus operations on that network.

As the regional transport partnership, **SPT** is responsible for the delivery of the RTS, for maintaining bus stops and shelters and some bus stations in the region, as well as maintaining some of the region's Park & Ride facilities. By agreement with their constituent authorities, they are responsible for the delivery of supported (subsidised) bus services (which cannot compete with commercial services) as well as MyBus and school transport. SPT also operates and maintains the Glasgow Subway and is responsible for the management of the ZoneCard. While SPT cannot stipulate the bus network operating across the region, they actively engage with operators through voluntary partnership arrangements and work with local authorities to identify

and contract the delivery of socially necessary supported services. It is worth noting that in some areas the tendered socially necessary supported services can form a significant proportion of the bus services available.

The 12 **local authorities** in the SPT area prepare and deliver Local Transport Strategies, and as the local roads authorities, are responsible for the implementation and maintenance of the local road network, including any bus priority infrastructure. Local authorities can implement Low Emission Zones in relation to vehicle quality and emission standards and can own bus stations (e.g., Kilmarnock is owned by East Ayrshire Council). However, the local authorities do not have the powers to govern bus operations across their areas and cannot prevent the curtailment or removal of services.

As discussed above, in terms of bus operation, there are around **40 bus operators** across the region, with three major service providers - First, McGills and Stagecoach - each with a strong foothold in certain geographical areas, and between them operating around 80% of all bus vehicle kilometres across the region. Operators are under no obligation to run specific routes or services and can provide services anywhere where these are registered with the Traffic Commissioner. Operators can alter, reduce or indeed implement new services, although there is a requirement for this to be done in consultation with the local transport authority(s) impacted. Operators may also bid to run subsidised services contracted by SPT. There are a further **four core coach service operators** who provide longer distance inter-urban services within and to and from the region. Again, such operators are under no obligation to run specific routes or services and can design and operate their own network provided services are registered with the Traffic Commissioner (where this is necessary).

Two **voluntary partnerships** operate across the region, bringing together local authorities, SPT, bus operators and bus passengers to address challenges and improve the passenger experience.

The **Glasgow City Region Bus Partnership**[57] covers the eight Glasgow City Region local authorities, SPT, bus operators (through the **GlasGo Bus Alliance**[58]) and bus passenger representative groups to address current challenges to bus travel and to improve the passenger experience for communities across the region. The Partnership has three main aims:

- Improving bus priority mechanisms and reducing congestion to improve bus journey times and reliability
- Ensuring buses are given higher priority in any future city planning
- Improving the accuracy of real time passenger information and exploring options to introduce an integrated ticketing system

The Glasgow City Region Bus Partnership also supports the delivery of Glasgow's Low Emission Zone and brings together key partners to develop bus priority funding bids to Transport Scotland's Bus Partnership Fund[59] - set up as part of the Scottish Governments response to the climate emergency and providing a long-term investment of £500m to deliver targeted bus priority measures on local and trunk roads. An award of up to £3.66m[60], made to the Glasgow Bus Partnership, was awarded for bus priority interventions within the Glasgow City Region through the first round of the fund. Of this funding, £2m was made available for bus priority interventions in Paisley town centre, and £275,000 for infrastructure improvements on Hope Street and Howard Street in Glasgow city centre. The award also included £1.38m to progress detailed business cases for five key bus corridors across Glasgow (Paisley Road West, Maryhill Road, Dumbarton Road, Pollokshaws Road and Great Western Road) and to fund work around a wider strategy.

Finally, a range of Bus Advocacy and Campaign groups exist to be the voice of Scottish Bus Passengers as well as address inequality, social isolation, air quality and the climate agenda.

Key Point

Fundamentally under the current bus network delivery model, only bus and coach operators have the powers to plan and design their respective bus networks whereas SPT is only able to plan socially necessary bus services.

57 https://www.glasgow.gov.uk/glasgowbuspartnership

58 https://glasgowbusalliance.com/

59 https://www.transport.gov.scot/public-transport/buses/bus-partnership-fund/

60 Glasgow Bus Partnership Awarded £3.655m to Deliver and Develop Bus Priority Measures Across Glasgow City Region

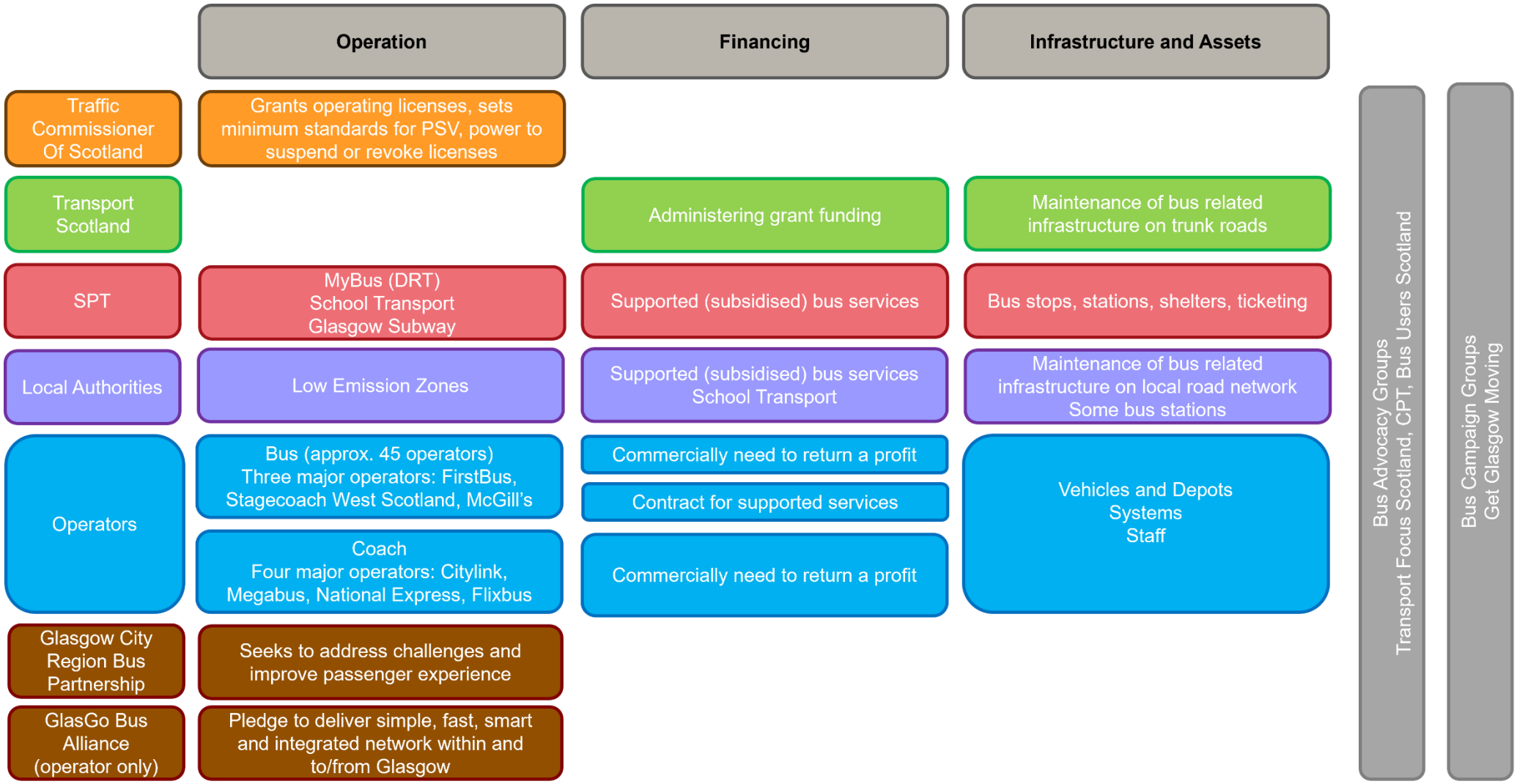


Figure 46: Bus Operation and Delivery in SPT area: Roles and Responsibilities

Financial Context

The majority of bus services in the region are provided on a commercial basis by privately owned bus companies who recover the cost of operating their services through a mixture of farebox revenues and a range of government support[61]. At the Scotland level, total government support in 2019/20 made up 49% of total operator revenue. Of that 49%, 18% came from local authority bus support, 66% came from concessionary fares reimbursement, and 16% came from BSOG[62]. Concessionary fares reimbursement is paid by the Scottish Government as recompense for the for the carriage of persons eligible for free bus travel in Scotland[63].

Socially necessary services which are provided through tendered contracts let by SPT are funded from SPTs revenue budget which is predominantly drawn from contributions from the 12 constituent councils. The SPT funding of tendered contracts has risen over recent years as discussed earlier.

Grants

The financial grants that are, or were, available to support bus services in Scotland fall into three distinct time periods: prior to COVID-19, during and immediately following the pandemic, and the period since the end of post-COVID transitional arrangements and going forward (as shown in Figure 47).

Prior to COVID-19

From 2000 to 2022, the BSOG[64] was the principal form of support for local bus services. Introduced in the Transport Act 2000, it replaced Fuel Duty Rebate and initially operated in a similar way, giving a per litre rebate on the duty levied on fuel used by operators of eligible local bus services. BSOG was devolved in 2010 when Transport Scotland assumed responsibility for administration on behalf of Scottish Ministers. From this time, the formal link to fuel duty was removed and, instead, payment calculations were based upon the numbers of live service kilometres run per bus.

Additional grants for low carbon buses were introduced in 2010, initially in the form of the Low Carbon Vehicle (LCV) incentive, which was payable at a single rate for all eligible vehicles for a five year period. Since 2019, this has been replaced by the Low Emission Vehicle (LEV) incentive, but with differentiated rates according to Greenhouse Gas savings compared to a Euro VI standard diesel bus.

The National Concessionary Travel Scheme for Older and Disabled People (ODPS)[63] was introduced in April 2006 and provides free bus travel throughout Scotland at any time of the day for holders of a NEC who are aged 60 or over or are

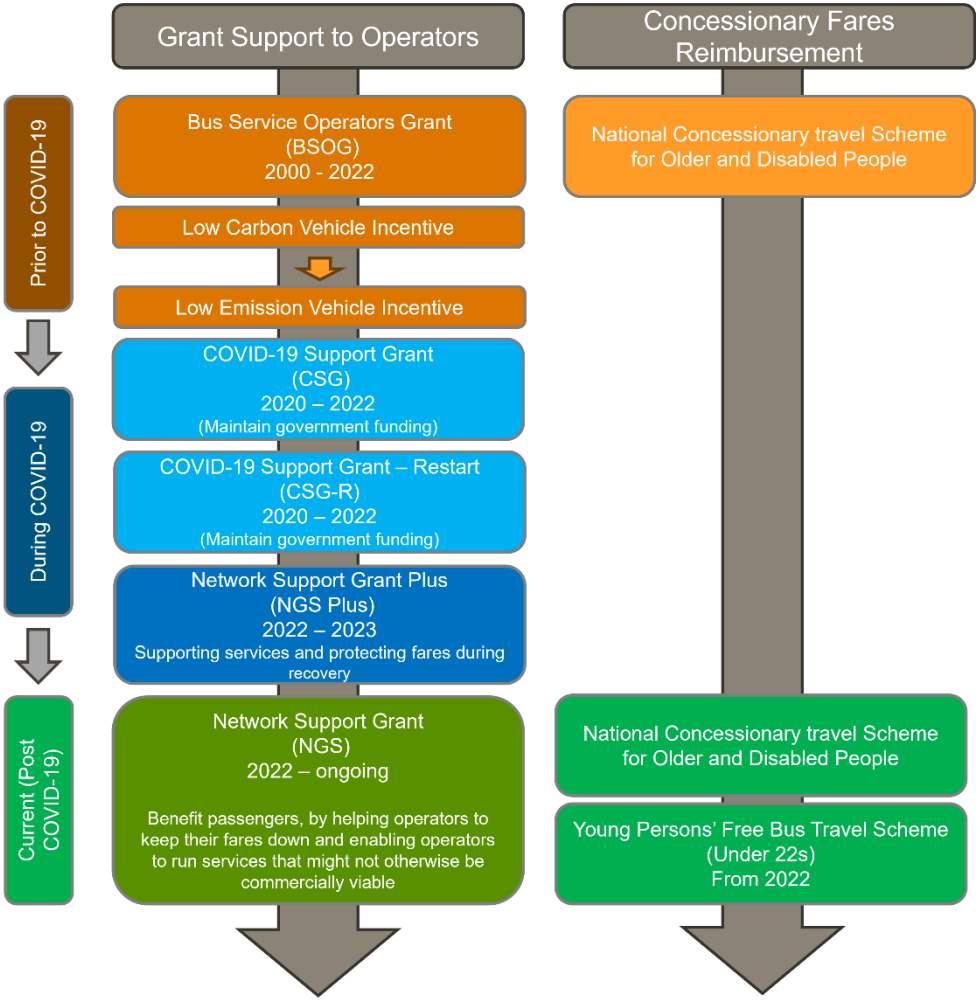


Figure 47: Financial Support for Bus Operators

disabled. Transport Scotland compensates bus operators for the revenue foregone on the basis that they should be financially 'no better off and no worse off' because of their participation in the scheme. Reimbursement is calculated by applying a national rate to the adult cash single fare that would have been paid for individual

[61] Local authority bus support, concessionary fares reimbursement, and the Bus Service Operators Grant (BSOG)

[62] Scottish Transport Statistics, Tables 2.2a and 2.9

[63] With eligibility including for Young Person's (Under 22) (Under 22s free bus travel | Transport Scotland) and those aged 60 and over and disabled people (Eligibility and Conditions for the 60+ or Disabled Traveller (transport.gov.scot))

[64] Information on the Bus Services Operators' Grant (transport.gov.scot)

concessionary journeys. Transport Scotland also reimburses any additional costs that operators might incur as a consequence of providing free travel.

During and Post Pandemic

New funding streams were introduced by Transport Scotland to support bus operators during the pandemic, consisting of a *Covid-19 Support Grant* (CSG)[65] which sought to maintain government funding and *Covid-19 Support Grant – Restart* (CSG-R)[65] which compensated operators for the loss of fare paying passenger income and the impact of higher input costs.

The CSG maintained Scottish Government funding at pre-pandemic levels despite the substantial reduction in the number of passengers carried and the volume of local bus services operated. CSG was used specifically to keep National Concessionary Travel Scheme reimbursement and BSOG payments at the levels forecast prior to the impact of COVID-19. Eligible operators were required to continue to deliver around 30% (25-35%) of bus service levels for the period of the scheme and engage with relevant local authorities and health boards to determine which services should operate. The CGS ceased on 31st March 2022.

The CSG-R was in operation from June 2020 to March 2022 and comprised additional funding from Transport Scotland to support bus operators to increase bus services during the pandemic. CSG-R covered the gap between costs and anticipated loss of fare-paying passenger revenue that bus operators experienced due to physical distancing and reduced carrying capacity. It was available to support both fully commercial and local authority supported services. This funding ensured operators were able to run vital services through the pandemic, whilst also taking into account the rapidly rising costs of fuel, energy and staffing. The CGS ceased on 31st March 2022.

The Network Support Grant Plus (NSG Plus)[66] was temporary recovery funding in place from 1 April 2022 to 31 March 2023, aimed at supporting services and protecting fares while bus patronage continued to recover from the impacts of the pandemic. The scheme assisted operators' recovery from the effects of the COVID 19 pandemic.

Current Funding

The Network Support Grant (NSG)[66] has been in place since 1 April 2022, and is a discretionary grant paid under Section 38 of the Transport (Scotland) Act 2001 by Transport Scotland on behalf of Scottish Ministers.

As with the previous BSOG scheme, NSG is payable on local bus services available to the general public with stops no more than 15 miles apart and on community transport services possessing a Section 19 or Section 22 permit.

The aim of the NSG is principally to benefit passengers, by helping operators to keep their fares down and enabling operators to run services that might not otherwise be commercially viable, thus contributing to the maintenance of the overall bus network. It also contributes to the operation of Community Transport services, allowing people who cannot make use of conventional bus services to access local services.

There is no allowance for low emission buses, other than honouring remaining BSOG LCV or BSOG LEV entitlement.

The National Concessionary Travel Scheme for Older and Disabled People continues in operation as pre-pandemic with a national reimbursement rate currently at 55.9%. The Young Persons' Free Bus Travel Scheme[67] ('under 22s') was introduced in January 2022 and provides free bus travel throughout Scotland at any time of the day for holders of a NEC or Young Scot NEC who are aged between 5 and 21 inclusive. Transport Scotland compensates bus operators in a similar way to the ODPS, with reimbursement rates currently (as of September 2023) at 43.6% of the adult single fare for journeys made by under 16s and 81.2% for journeys made by 16- 21 year olds.

65 COVID-19 Support Grant | Transport Scotland

66 Network Support Grant | Transport Scotland

67 Under 22s free bus travel | Transport Scotland

STRATEGY VISION, OBJECTIVES AND DESIRED OUTCOMES

The analysis as set out in this document has highlighted that while travel by bus needs to increase to meet a wide range of policy objectives set out in the RTS, bus services and patronage have steadily been in decline over the last 15 years or so. Across the bus network in the region:

- Some markets are not served at all, or served poorly
- There is limited or no true competition in terms of services and fares in many parts of the region
- There is network delay and congestion which is impacting on the attractiveness of the network and eroding passenger confidence and perceptions of travel by bus

These factors are increasing the ever widening gap between the existing bus network and the vision for a world class network as set out in the RTS, and as shown in Figure 48).

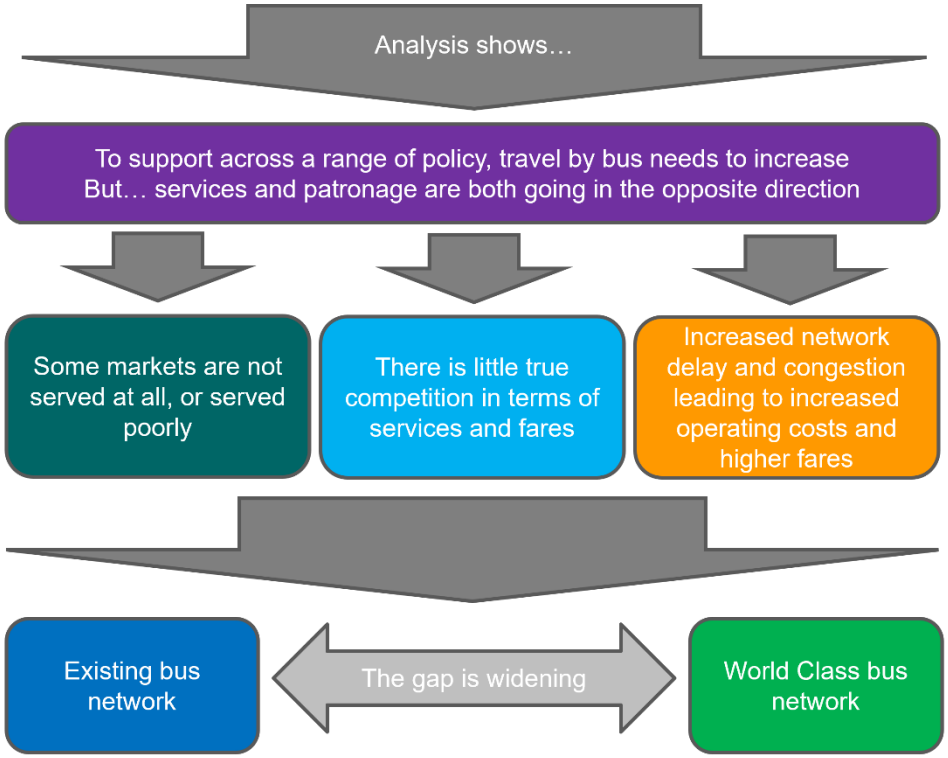


Figure 48: Widening gap between existing and world class

For passengers, the current deregulated model means:

- Fares and ticketing can be complex and more expensive with little integration
- Bus routes are run based on commercial reasons meaning some areas are better served than others but without recognition that bus services can generate wider economic, social and environmental benefits which can mean that it is economically efficient to increase supply above the levels determined by the commercial market
- Customer standards can vary given the number of service providers
- A loss in passenger confidence due to instability in the bus network (due to reduced services, changes in routes, poor reliability etc.) is evident
- There is competition between public transport modes rather than integration

In terms of present operation, the current deregulated model operating across the region (and indeed throughout Scotland) means that SPT and its local authority partners:

- Cannot easily provide a truly integrated transport network
- Cannot effectively and efficiently coordinate long-term transport strategy that supports the RTS vision
- Has very limited control over the routes operated, service frequencies, fares charged or tickets sold by operators
- Needs to provide increasing public sector funding to support socially necessary services to fill gaps in provision

This points towards a case for change in the delivery of bus operations (in its widest sense across a range of stakeholders) across the region and overall bus reform to start closing the gap between existing operations and a world class bus network. Any new delivery model would need to provide a more coordinated approach to the provision of a regional bus network, providing more efficient, fast and reliable services, cheaper and simpler fares, an improved passenger experience and a network which is resilient to change.

Given this, the key aim for the SRBS has been set as:

To provide a world class bus network which reverses the long-term decline in travel by bus, by developing a more efficient bus system which is fully integrated with other public transport, affordable to all and plays a key role in the social, environmental and economic development of the region

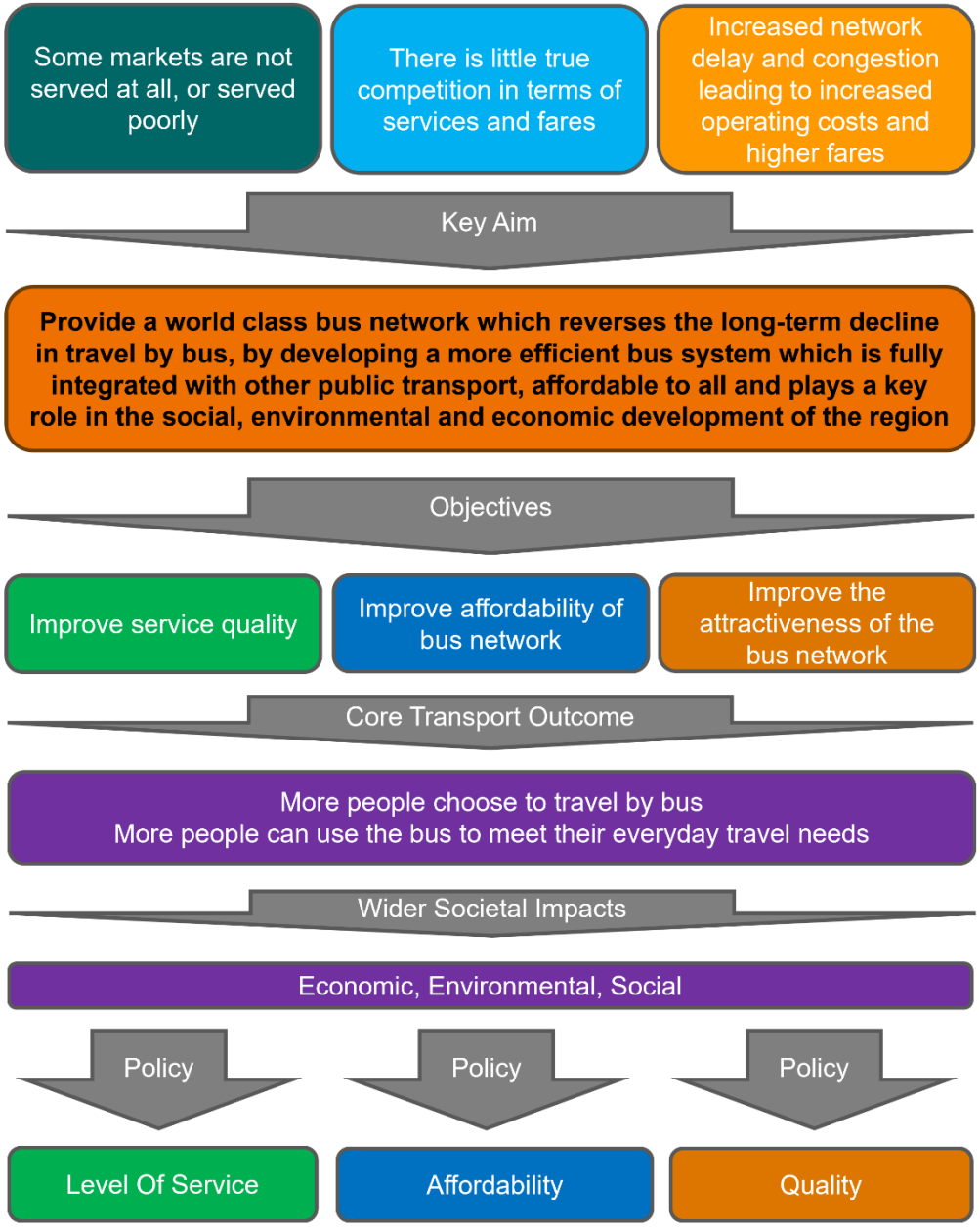


Figure 49: Problems to Policies

This key aim gives rise to three Strategy Objectives as shown opposite, and meeting these objectives will result in the fundamental transport outcomes for the strategy – **to get more people to choose travel by bus and that more people can use the bus to meet their everyday travel needs.**

Achieving these outcomes would in turn provide a wide variety of benefits to society, which would align to policies around decarbonisation, social inclusion and the widening of opportunities, economic growth and placemaking.

To express how the three objectives can be met, and help shape the development of options to be appraised, three core **policy areas** will flow from the objectives, focussed around:

(i) **Level of Service** – this policy area considers how, where and when the bus network operates. For example, it will set out ambitions for the hours of operation of bus services, how frequently buses run, and the connectivity of the bus network in terms of providing more people with access to bus services. Additionally, it will set out the types of bus services to be operated and how they are deployed within the Strathclyde context, e.g., express, inter-urban, or demand responsive services.

(ii) **Affordability** – the policy will set out ambitions related to the affordability of travel by bus across the region, including factors such as the structure, legibility, and integration of fares

(iii) **Service Quality** – the policy will focus on the other important aspects that allow the delivery of a world-class bus service. This includes topic areas, such as interchanges and bus stops, information, ticketing, vehicle and driver standards, and service reliability and punctuality

NEXT STEPS

These policies will set out in more detail SPT's aspirations for a world class bus network and its relationship with other modes of transport across the region, and they will be developed at the start of the next task, Options Appraisal.

The Options Appraisal will assess, based on an approach which is compliant with the Scottish Transport Appraisal Guidance (STAG), how well the current model plus alternative delivery models can deliver these policies and hence the objectives and vision, together with the associated costs and therefore the value for money.