



The future of rural bus services in the UK



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Executive summary

Rural areas account for 85 per cent of land in England and 18 per cent of the population. Low population density makes practical and affordable public transport difficult to provide in these areas. However, accessible and affordable transport is a lifeline for many rural residents. Rural areas are very car dependent, as public transport is perceived as inadequate.

Rural areas have significantly lower rates of bus use compared with urban areas. However, buses remain an important part of rural life. Over a quarter of all bus passenger journeys in England outside of London are in predominantly rural areas or towns with rural hinterlands.

There has been a spiral of decline in rural public transport, which has been exacerbated by pressures on local government finances in recent years resulting in reductions in support for bus services. Between 2011/12 and 2016/17, rural bus mileage fell by over six per cent. During this period, patronage on supported bus services in non-metropolitan areas of England fell by more than 30 per cent and in Wales by 44 per cent.

Over the last ten years, increases in average bus operating costs have outstripped changes in average revenue, leading to reduced margins and contributing to the withdrawal of both commercial and supported services. Rural buses are at the extreme edge of the spectrum because they carry fewer people per mile operated and are therefore less secure economically. As a result, they are more at risk whether they are operated commercially or supported.

There has been no strategic leadership or vision for rural public transport. Provision has been piecemeal and fragmented. Most provision relies on public funding in different forms. Meanwhile, urban areas benefit from commercially provided bus networks. They are also seeing innovation in respect of on-demand transport, car clubs, bike hire schemes and mobility as a service initiatives.

Over the years, government has expressed the need to support rural public transport and various funding streams have been introduced. These facilitated and encouraged the development of new community transport services and enabled the principles of demand responsive services to be established. In some areas these kickstarted entirely new approaches to the provision of rural public transport, such as the InterConnect network and CallConnect demand responsive services in Lincolnshire, which are well established and continue to flourish. In other areas, new services were withdrawn when project funding ran out.

Over the last 30 years, bus operators have seen the potential of inter-urban bus services, and many of these pass through rural areas. These were boosted with the introduction of free concessionary travel for older and disabled people, as they offered opportunities for different days out.

Since 2009, rural public transport has been under pressure as public funding has reduced and many local authorities have cut support for bus services. However, to mitigate these impacts, other short-term initiatives have occurred, including the Department for Transport's (DfT) Minibus Fund and Total Transport pilot funding. The latter explored how taking an integrated approach to the provision of all passenger transport services might lead to efficiencies and help sustain rural transport services. Developments in technology also offer opportunities for new types of transport service.

Today, a patchwork of different forms and types of public transport exist across rural areas, resulting from many different factors. There is no sense of network – services are run by different operators, little or no coordination between them, and a lack of integrated ticketing. However, there are needs to be met in rural areas and significant sums of public money are spent on providing transport in those areas, such as for school and patient transport services.

There will continue to be a need for rural public transport. However, it is time for a more comprehensive, consistent and concerted approach to be taken based on a planned network wide concept, as found in other European countries. This can be built on some of the principles that we know can work, as follows:

- Framework of inter-urban bus and local rail services
- Demand responsive provision in areas of low demand
- Involvement of communities in the planning and development of transport services
- Harnessing community-based transport, taxis and private hire vehicles as part of the public transport network
- Using integrated (Total Transport) approaches to achieve efficient provision
- Using technology to support information provision, ticketing and on-demand service provision.

Based on these principles, there is an opportunity to rethink the provision of rural public transport. However, this requires decision makers to recognise the importance of such transport and to establish the principle that all rural dwellers should have the opportunity of accessing reasonable public transport services. The acceptance of such a policy would imply the agreement to provide necessary long term and consistent funding to deliver services. With such support in place, it will be possible to take a fresh approach, based on the formation of Total Transport Areas within which single or combined transport authorities provide leadership in the planning, design, funding and provision of rural transport networks, working in partnership with other interested bodies, communities and operators.

1. Introduction

Aims of the research

Low population density and longer distances to travel make practical and affordable public transport difficult in rural areas. However, accessible and affordable transport is a lifeline for many rural residents. Effective transport networks enable rural communities to contribute to economic growth and support diverse, thriving populations.

In rural areas, those reliant on public transport often face a 'poverty of access'. Public transport tends to be limited in scope, time of operation and its ability to access the people in need. This poverty of access is a problem that can affect all sections of society.¹

Urban areas are benefiting from innovation in respect of on-demand transport and mobility as a service initiatives. However, rural areas do not offer the same commercial potential.

This paper considers the current position of rural public transport and how we got to this point. It considers various practices and prospects and tries to develop a way forward for the future provision of transport services in rural areas, based on trends, analysis, research and experiences. Taking stock of where we are now and the likely future needs of rural areas, it seeks to make recommendations for a way forward.

Current position

Bus travel in the UK has been in general decline for many years. Whilst this has been masked in recent years by significant increases in London, most urban (with some notable exceptions) and rural areas have seen falling patronage. Whilst the greatest reductions have been in metropolitan areas, other areas have seen a gradual erosion of patronage. These trends have given rise to many industry concerns, with different views and debates about how the fortunes of bus travel might be turned around. There has been much debate about the pros and cons of deregulated versus centrally-planned and franchised bus networks.

The significant pressures on public spending in recent years have led to reductions in local authority financial support for bus services. Along with maintaining evening and Sunday buses, most support in the past has focused on the provision of rural bus services. Consequently, as cuts in support have been implemented, it is rural areas that have felt the loss of services more keenly. In these areas, it is people with no access to a car that are most affected. For them, will the lack of independent mobility lead to greater isolation and loneliness? Will the lack of public transport have detrimental impacts on general health and well-being of rural communities?

There are dangers in allowing rural bus services to wither away. Once passengers have been lost, it is difficult to win them back and so the cycle of decline is perpetuated. Large numbers of people live in our rural areas. Of these, whilst a relatively small proportion rely on public transport, it is a vital service for them. Unless as a nation we are willing to abandon these people and either let them become isolated or struggle to find costly or inconvenient alternatives, we need to act to develop a strategy for public transport. If we fail to do something now, rural public transport will continue to wither and become increasingly difficult to re-energise with new solutions, as there will no longer be sufficient demand to justify the provision.

Rural areas

Rural is defined as those areas that surround settlements of over 10,000 people.

In England, these areas account for 85 per cent of the land area and 18 per cent (9.3 million) of the population. Of these, 4.5 million live in rural towns and fringes, 2.7 million in rural villages and 1.6 million in rural hamlets and isolated dwellings.²

2. Trends

Campaign for Better Transport has monitored reductions in spending on bus services by local authorities over the last few years.

Between 2010/11 and 2016/17 it calculates that £103 million has been cut from bus support across England and Wales. This represents a 32 per cent reduction in budget overall (33 per cent reduction in England and 24 per cent in Wales).³ Some authorities (mainly more urban ones) have withdrawn their support altogether. Some rural authorities have seen very significant reductions, such as Somerset (51 per cent), Leicestershire (57 per cent), Shropshire (60 per cent), West Sussex (64 per cent), Central Bedfordshire (75 per cent) and North Yorkshire (78 per cent). In the last couple of years there have been authorities (e.g. Lancashire and Norfolk) that have put forward major cuts to bus support budgets, created a lot of concern amongst those potentially affected, and then ultimately decided to continue their support. Whilst the outcome is welcomed, the uncertainty created will almost certainly have further dented the demand for those services under threat.

However, concerns about the maintenance of rural bus services have existed for many years. When bus services were deregulated in 1986, some authorities took the opportunity to reduce levels of support on the expectation that more services would be commercially viable. At various times over the last 30 years, local authorities have taken different views on the priority given to local bus support, depending on political viewpoints, availability of funding and competing pressures for public funding.

Through the late 1980s and 1990s, many local authorities had to continually review supported bus services in response to changing commercial services, service withdrawals and rising costs, which led to increasing pressures on available funding. As a result, supported services saw changes, reductions or replacement by alternative services. In parallel, new funding sources, such as the Rural Transport Development Fund in England and Rural Community Transport Initiative in Scotland, made it possible to develop new types of service, but these funds could not maintain existing services.

In a paper entitled *Rural Transport Futures* in 2003,⁴ Campaign for Better Transport called for new approaches to rural public transport, modelled on practice elsewhere in Europe. It pointed to inadequate bus services and poor accessibility to facilities and services for people in rural areas. It suggested that this resulted from a disjointed approach, with no overall control of how services link together, plus competition rules that restricted the ability to provide area-wide ticketing.

In 2007, Campaign for Better Transport produced a paper entitled *Rural buses: an endangered species*.⁵ In the light of the emphasis on urban transport, it warned against those who had given up on rural public transport and who felt that achieving an effective rural bus network was beyond reach. The paper suggested three main reasons why the viability of rural buses was fragile:

- Cheaper car use and increasing car ownership (assisted by the costs of motoring falling by ten per cent between 1997 and 2006)
- Rising costs of bus operation, particularly insurance, wages and fuel
- Increasing bus fares to compensate for declining passenger numbers.

The House of Commons Transport Committee undertook an inquiry in 2011 into the impact of funding reductions on bus services.⁶ Following the Government's 2010 Spending Review, three decisions had implications for funding the English bus industry:

- 28 per cent reduction in local authority revenue expenditure (2011/12)
- Change in formula for concessionary travel reimbursement (guidance 2011/12)
- 20 per cent reduction in the Bus Service Operators Grant (BSOG) for 2012/13.

The Committee noted that 70 per cent of local authorities had already decided to reduce financial support for bus services. Most at risk were evening and Sunday services, non-statutory school services, most expensive contracts and services with the highest cost per user (such as rural buses). It was noted that whilst some local authorities were seeking to be objective in their approach to service cuts (such as cutting support for all evening and Sunday services), it was likely that within each group there would be differences in service performance. Therefore, impacts would vary from service to service; however, these were not considered.

The DfT's analysis of the impact of the 20 per cent reduction in BSOG outside London was that fares would increase by one to two per cent, services would decline by 1-2 per cent and patronage would decline by one to three per cent. In all cases, the worst impact would fall on small towns and rural areas.⁷

In recent years, overall growth in bus patronage (mainly due to increasing use in London) masked declining usage elsewhere. However, reported falls in overall bus and rail use in the last year have attracted much attention, with analysis of what might be happening. In England (outside London) bus use fell by three per cent in 2017. Various reasons for this have been put forward:⁸

- Changing employment patterns (e.g. flexible, part-time and home working)
- Ability to stay at home (e.g. online banking, online shopping and home deliveries, home entertainment)
- Increased car use (reduced costs of motoring; healthier and wealthier older people who continue to drive; car sharing)
- Increased congestion, causing slower journey times for buses
- Reduced local authority support for bus services, leading to withdrawal of services
- Reduced rate for concessionary travel reimbursement
- Real increase in commercial fares, making bus travel relatively more expensive.

*"Pressure on local authority budgets has taken money out of the industry. Annual spending by local authorities on tendered bus services has fallen by over £100 million since 2010 and had a knock-on impact on the structure of commercial networks. Reimbursement rates for concessionary travel have dropped to the extent that operators have had to increase fares to subsidise concession passengers."*⁹

Whilst acknowledging falling levels of support by local authorities, Government has pointed to its initiatives that have provided funding for alternative fuels and green buses. However, this type of funding is mainly aimed at urban situations. Indeed, where support was given for electric vehicles in Denbighshire, it attracted criticism for being wasted in a rural area where air quality was not an issue. Equally, the vehicles were unable to perform adequately in a rural area, having insufficient charge for a whole duty.¹⁰

In urban areas, competition from the rapid growth in private hire vehicles (PHV) has been seen as a factor behind a fall in patronage. Equally, the large numbers of taxis and PHVs on city roads have been blamed for greater congestion and slower bus speeds.¹¹

Former bus manager Ben Colson noted that rural buses are at the extreme edge of the spectrum because they carry fewer people per mile operated and are therefore less secure economically. Therefore, they are most at risk regardless of being commercial or supported. Urban routes, with more passengers and greater revenue per mile, were more resilient.¹² He argued that bus operators have faced 20 years of negative interventions, including increased staff costs resulting from changed employment regulations, depressed income resulting from concessionary travel and reduced reimbursement rates, and 20 per cent cuts in BSOG. Meanwhile, the Government scrapped the fuel duty escalator for private motoring, contributing to the reduction in the real costs of motoring. The situation has been worsened by reduction in support for bus services. As a result, he suggests that rural bus services have been abandoned by suppliers more than by their users.

“Shire bus use was remarkably resilient, but it is now being driven down by service withdrawal as costs outside operators’ own control continue to rise. Whilst some local authorities have tried converting fixed route bus services to demand responsive or sought to replace with community transport, change tends to lead to further reductions in passengers.”

Reductions in patronage in Wales have similarly been blamed on funding cuts. Between 2013/14 and 2016/17 there was a 5.7 per cent fall in patronage. This was seen as a reaction to funding reductions made in 2013/14, when the Welsh Government replaced BSOG with Bus Services Support Grant (BSSG), which was 25 per cent lower than its predecessor. It also reduced Local Transport Services Grant (for local government to support services) by 27 per cent. This led to service reductions and fares increases. Subsidised bus miles in Wales fell by 36 per cent from 2012/13 to 2016/17, whilst commercial mileage saw a smaller decline.¹³

The impact of reductions in local authority supported services is quite marked, giving a decline in all areas. As shown in Table 1, the impact has been greater outside the English conurbations in areas where supported services play an important role. Between 2011/12 and 2016/17 patronage on supported services in non-metropolitan areas fell by more than 30 per cent.

Table 1: Passenger journeys on supported local bus services

Passenger journeys (millions)	2011/12	2016/17	% change
Non-metropolitan (England)	170	116	-31.8%
Metropolitan (England)	926	865	-6.6%
Wales	18	10	-44.4%
Scotland	35	27	-22.9%

Source: DfT Bus Statistics BUS012

Whilst patronage on supported services has declined (mainly due to the withdrawal of funding to maintain the services), over the same period passengers on commercial services have held up more in the non-metropolitan areas than the metropolitan areas. This might partly be due to some previously supported services being taken over by operators on a commercial basis. Scotland and Wales have both seen a decline in usage of commercial services.¹⁴

A key determinant of bus use is the level of car use. This is influenced by car ownership and the proportion of the population able to drive. Table 2 shows how car ownership has grown generally and is significantly higher in more rural areas, particularly in respect of households with two or more cars. In the last 15 years, there has been particular growth in the proportion of women able to drive in all areas. About 90 per cent of adults in rural villages, hamlets and isolated dwellings hold a full car driving licence.¹⁵

Table 2: Household car ownership (percentage of households)

	No car/van		One car/van		Two or more cars/vans	
	2002/03	2014/15	2002/03	2014/15	2002/03	2014/15
Urban conurbation	35	33	41	42	24	25
Urban city or town	24	23	46	44	31	33
Rural town and fringe	17	14	42	44	41	42
Rural village, hamlet or isolated dwelling	7	6	39	35	53	59

Source: National Travel Survey NTS9902

Overall trips made by all modes are similar in urban and rural areas. Travel by local bus is relatively low in all types of area, accounting for just five per cent of all trips (excluding walk trips less than one mile) in urban areas and two to three per cent in rural areas.¹⁶ Rural dwellers travel greater distances overall per year than their urban counterparts. However, the proportion of mileage travelled on local bus services in rural areas (1.7 to 3 per cent) is lower than the proportion of journeys made by that mode, implying that bus journeys are shorter than the journeys made by car.¹⁷

Whilst distances travelled by rural dwellers are longer, the average time spent travelling per person per year is similar for all types of area and has been decreasing gradually over the last ten years. In 2014/15, rural dwellers spent an average of 384 hours per year travelling, whilst urban dwellers spent 364 hours.¹⁸

The average number of commuter trips is less in rural areas, but the average number of shopping trips is slightly higher than in urban conurbations and slightly lower than urban cities and towns.¹⁹

The DfT's Accessibility Statistics²⁰ indicate that people in urban areas could access key services by public transport or walking, on average, in 12 minutes compared with 22 minutes in rural areas. Access to all key services (employment, education, GP, hospital, food store, town centre) by public transport or walking was worse in rural areas than urban areas, particularly hospital (17 per cent compared with 32 per cent). The percentage of the rural population with 'reasonable' access to key services fell slightly between 2010 and 2011 for most services and by most modes. 'Reasonable' access by public transport fell by around 0.5-0.7 per cent, though access to hospitals fell by 2.3 per cent.

The index of households with good transport access (areas with either high car ownership rates or short public transport access times) to key services or work fell between 2007 and 2011 from 100 to 97. As average vehicle ownership rates did not change much during that period, this may suggest that public transport services decreased, resulting in increased travel times for users.

Key points:

- Bus use has been declining, mainly due to rising car ownership
- Bus usage held up better in non-metropolitan areas up until 2010
- Public sector spending cuts have led to reductions on rural bus services since 2010
- There have been concerns about rural bus services for many years.

3. Importance of rural bus services

Whilst rural areas are unable to generate the same levels of bus use as urban areas, they account for a significant proportion of passenger journeys.

As shown in the following table, over a quarter of bus passenger journeys in England outside London are made in areas with significant rural hinterlands or that are mainly rural.²¹

Table 3: Bus passenger journeys (millions) in mainly rural areas of England

Millions of journeys	Urban with significant rural	Largely or mainly rural	England outside London	Proportion of journeys in areas that are significantly rural
2004/05	363	254	2,224	27.7%
2010/11	398	292	2,349	29.4%
2016/17	367	267	2,198	28.8%

Table 3 shows that bus usage in rural areas rose in the 2000s, but then declined after 2010/11, when cutbacks in financial support for bus services started to take effect.

The House of Commons Environment, Food and Rural Affairs Committee recognised the importance of rural public transport in sustaining rural communities, suggesting that the Government “needs to be more expansive in its vision if it has any chance of reversing the downward trend of access to key services for people living in rural communities.”²² It went on to make a number of recommendations to support and develop rural public transport.

Key points:

- Bus use is lower in rural areas, although significant numbers of bus journeys occur outside of urban areas.

4. Past experience

The problems of providing sustainable public transport in rural areas have been around for a long time. Over the years there has been a host of initiatives aimed at encouraging new approaches or supporting provision.

For many years, postbuses combined mail delivery and collection with the carriage of passengers in deep rural areas. Indeed, as recently as the 1980s, the Royal Mail developed new services. However, services were gradually withdrawn due to poor usage, privatisation of the Royal Mail and to concentrate on the core business of carrying the mail.

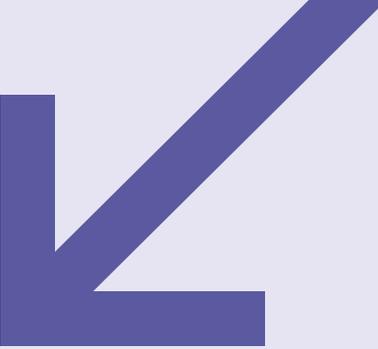
Traditionally, bus services were used to convey parcels and newspapers out to villages. For a number of years, the Border Courier service ran in the Scottish Borders, conveying medical supplies, blood samples and internal mail for the health service alongside passengers.

The 1980 and 1985 Transport Acts introduced opportunities for voluntary car schemes and community transport services to be developed. The late 1980s saw the Countryside Commission provide Rural Transport Development Fund support for many community transport initiatives, including community buses operating under section 22 permits. A number of new community bus groups were established at the time (including five in Bedfordshire, for example) and secured funding to buy a minibus and introduce local registered local bus services. Most of these continue to provide services today, based almost entirely on the efforts of volunteers.

A Government Transport White Paper in 1998 focussed on increasing rural bus services, as 20 per cent of rural settlements in England were estimated to have a bus service below 'sustainable levels' - with fewer than four return journeys per day and no evening and weekend service.²³

A significant boost in England came from the introduction of the Rural Bus Subsidy Grant (RBSG) in 1998.²⁴ £58 million was allocated to local authorities according to rural population (this ceased to be ring-fenced in how it could be spent in 2008). This injection of funding was used by Lincolnshire to kick-start its InterConnect services (along with successful bids for Rural Bus Challenge funding), enabling a significant transformation of the rural network.

Authorities used the RBSG to establish new or enhanced rural bus services. Whilst some of these services opened up new travel opportunities, there were instances where they diluted usage on other existing services. Furthermore, many failed to generate sufficient usage to continue (indicating how difficult it can be to develop new markets for bus travel in rural areas), as local authority support reduced, and were ultimately partially or totally withdrawn.



Inter-urban bus services

The last 20 years have witnessed the development of many inter-urban bus services. Whilst primarily linking two or more towns or cities, any villages that happen to lie on their routes will benefit, providing a good level of service for those rural communities compared with other villages away from the route. Most such services have been developed by operators on a commercial basis, and in many cases do not form part of any planned sub-regional network. Usage has been boosted by free concession holders, although in a few cases such services have been excluded from free travel schemes by local authorities on the basis that they are premium services. As much of the demand is end to end, services have generally become more direct and operate as limited stop, sometimes removing diversions through villages.

A recent report by Greengauge21²⁵ seeks to raise the profile of inter-urban bus services. It considers several case studies, including some where networks have been developed. TrawsCymru is a strategically-designed network across Wales, promoted by the Welsh Government, which aims to fill gaps in the public transport network and provide connections with other bus and rail services. It has developed gradually, either creating new services or building on existing ones, bringing them up to a common standard and with enhanced levels of provision. TrawsCymru branding has been applied across all services. Services are long distance, but offer local travel opportunities along the route.

In some cases, services have been made more direct and have been withdrawn from village diversions. To compensate, other local services, such as the Bwcabus DRT service in south west Wales, have been introduced to serve rural communities. Bwcabus aims to meet local travel needs and connect with TrawsCymru services for travel further afield, helping to build usage of the inter-urban network.

The authors of the report consider that TrawsCymru delivers very wide connectivity at low levels of subsidy. If usage continues to grow this will improve the performance even further. It also noted that there is scope for further routes, such as T7 Brecon - Abergavenny - Monmouth - Chepstow, which would build on existing services that separately run between each of the towns on the route. Whilst providing more travel options for some rural communities that happen to lie on the route, some currently served by diversions may lose the use of a service and require alternative provision.

Having got this far with the TrawsCymru network, future challenges include improving the associated infrastructure (such as bus stop facilities), integration with rail franchises (to achieve integrated ticketing and joint promotion) and greater marketing and awareness within the tourist market. These will help to ensure the future sustainability of the network.

In Lincolnshire, RBSG and Rural Bus Challenge funding provided the ability to develop the InterConnect network. In 1999, service six between Lincoln and Skegness formed the backbone of the network, eliminating some of the village diversions. Demand responsive Call Connect services were introduced to cover the villages and to provide interchange with service six at Horncastle and Spilsby. Other InterConnect and Call Connect services were gradually added to the network, with common branding and service standards.

A survey in 2008 showed that usage had been encouraged by improved regular services, both by existing and new users. Services that had become half hourly showed substantial modal shift, with 48 per cent of journeys previously made by another mode (of which over two thirds had been by car). The network provides good connectivity across a very rural area and has demonstrated that with appropriate frequency enhancements can be a viable alternative to the car.

Rural Bus Challenge funding was bid for by local authorities. As innovation was one of the competition criteria, many local authorities included the introduction of Demand Responsive Transport (DRT) services in their bids. Many of these services, when introduced, suffered from high costs of provision and saw limited success in passenger numbers. In some areas, resistance to the idea of DRT services meant that they were introduced over and above existing services, which limited potential usage. As a result, many services did not survive long beyond the end of Challenge funding; some reverted to fixed route services, which were cheaper to operate than the costly back-office systems required for DRT services. Again, Lincolnshire used the funding to kick-start the development of its countywide network of demand responsive Call Connect services, which continue to this day. Furthermore, economies of scale have been achieved through the expansion of the services to neighbouring areas and the use of a single booking and scheduling office.

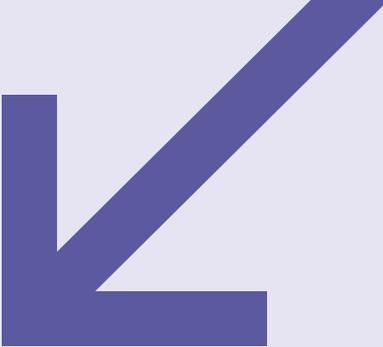
Some Rural Bus Challenge funded trial DRT services were judged as reasonably successful and were further developed as a means of improving accessibility, at a time when Local Transport Plans had an emphasis on addressing social exclusion. Shropshire Council launched its ShropshireLink countywide DRT service in 2008. Nine minibuses were deployed in nine zones, each based around a market town, with services offered Monday to Saturday and integrated with school transport provision. The services offered point to point transport, with a door to door services for people with limited mobility. At the same time, one day per week conventional bus services were withdrawn. ShropshireLink sought to replicate these journeys; however, there was evidence of new demands emerging, suggesting that the previous fixed services had not been meeting all needs.²⁶

Two years after its introduction, ShropshireLink had seen 140 per cent increase in usage, compared to the services it replaced. Prior to the introduction of the service, only 57 per cent of rural households could access their nearest market town at least two days per week. With ShropshireLink, this rose to 97 per cent. However, faced with the need to reduce spending on local bus services, the service was withdrawn in 2013.

In Scotland during the 1990s, the introduction of the Rural Community Transport Initiative provided funds to spearhead the establishment of community transport organisations in areas where previously there had been little such activity, such as the Wigtownshire Transport Coordination Project and Annandale Transport Initiative in Dumfries & Galloway.

Between 1998 and 2005, the Countryside Agency provided support for a network of Rural Transport Partnerships, with dedicated officers and opportunities for grant support for rural transport initiatives, including Wheels to Work and community transport. There was also Parish Transport Grant scheme to help fund local projects. A few Rural Transport Partnerships continued beyond the funding period, bringing interested organisations together to support and promote rural transport. Such a partnership was maintained in South Staffordshire, for example, which oversaw the development of the South Staffordshire Connect DRT service.

In recent years, and particularly in the light of bus service withdrawals, several local authorities (including Medway, East Riding of Yorkshire and Lancashire) introduced toolkits to help their communities undertake parish transport needs surveys and consider their own potential solutions to identified gaps, including new or enhanced community transport provision. In some areas (e.g. Herefordshire), Parish Councils have contributed financially to supported local bus services, in some cases specifically raising this through their parish or town council precept.



Demand Responsive Transport services (DRT)

Whilst there had been interest in DRT from the 1970s, in the 1980s DRT was generally limited to niche markets (such as Dial-a-Ride or community transport), small scale services or replacements for expensive and poorly used supported conventional bus services (such as HomeHoppa taxibus service in Bedfordshire).²⁷

DRT services saw growth in England with the advent of Rural Bus Challenge funding in 1998. The aim of these services was to see whether a different type of service could stem the decline of rural bus services. However, there were various problems:²⁸

- High cost per passenger trip (due to the costs of drivers, call centres and IT systems)
- Low usage and revenue
- DRT not integrated into the wider policy context
- Challenge funding timescales didn't allow for detailed planning
- Services introduced in addition to conventional ones
- Lack of interest from operators in operating such services
- Perceptions that services were not public transport, but for certain groups, particularly as membership registration was needed
- People preferred fixed route services, even if they were infrequent.

Despite these problems, Challenge funding did help develop, test and use new technology, including vehicle tracking and systems for routing and scheduling. It also highlighted the complexities of different regulations and licensing for the operation of smaller vehicles, which constrained the design and operation of services. Various DRT services introduced with Challenge funding started to be rationalised or withdrawn as external funding came to an end and pressure mounted on budgets to maintain main bus services.

Wiltshire introduced its Wigglybus in 1998, then developed other services, such as 'Hopper' and taxi-based DRT. Whilst critical of the ad-hoc development of these services, randomly-organised booking arrangements, confused branding and marketing and complex fares structures, the evaluation report noted that Wiltshire's DRT services performed well in respect of usage and cost/passenger compared with services elsewhere; this may have been helped by the integration of some school transport requirements. It suggested that 16-seat vehicles were not ideal for DRT operation, as they were generally too small for school transport, but more expensive than 8-seat vehicles.

The study recommended that:

- Rural public transport (and DRT) needs to be integrated with wider policy areas
- DRT needs to be developed more systematically (identifying needs clearly and establishing appropriate solutions)
- DRT services should be standardised and share a single call centre
- Greater integration with other types of transport (Special Educational Needs (SEN), social care, Non-Emergency Patient Transport (NEPT)) should be investigated, without unduly compromising DRT

- Where appropriate, DRT should act as a feeder to a mainline service
- Operating arrangements should be as simple as possible
- Vehicles should either be 8-seats or larger 24-seats
- Government be lobbied to change restrictive legislation governing smaller vehicles.

An earlier national study of DRT recommended that licensing, financing and regulatory regimes be simplified; that institutional measures and policies be reformed to grow and support the public transport market as a whole; that more effective marketing and promotional methods be found; and that technology be further developed to more effectively match the right vehicle at the right time to the right place.²⁹

An evaluation of six Local Link DRT services in Greater Manchester³⁰ concluded that ingredients of success included:

- Good understanding of needs, with the service designed with these in mind
- Simplicity of operation and booking procedures, with targeted marketing and good customer care
- Gaining economies of scale in the provision of the service
- Integrated ticketing, but charging realistic fares in recognition of the good service provided (recognising the value people place on the service).

The potential for DRT to play an important role in rural public transport has been recognised for some time. A 'thinkpiece' for the Commission for Rural Communities in 2009³¹ suggested that there was considerable scope for DRT:

"Whilst the experiences of DRT over the last ten years have seen successes and failures, they have all helped to provide valuable insights into the circumstances and conditions where DRT can be successful. There is much evidence to support the view that there is a role for DRT; the challenge is knowing where, when and how to deploy it as an appropriate solution."

The paper noted that DRT offers various opportunities because of its flexibility and ability to integrate with other services, offer personalised services and be cost effective. It also noted there were several barriers that had been around for a while and still needed to be addressed. Whilst some of those still exist today, such as the complicated regulations and licensing arrangements, others have been addressed through the improvements in technology, which have allowed on-demand transport services to develop and bookings via apps.

The paper suggested that rural DRT services were amongst the most vulnerable of such services, due to the low demand. Therefore, it was considered necessary to develop services that achieved the right balance between three main components: service design, value for money and operational attributes. Services needed to be carefully designed, with clear and specific objectives in mind and kept as simple as possible. Good market knowledge was needed to understand actual needs and demands and relevant local circumstances. Services needed to be part of a wider picture and integrated with other services, combining different types of demand and need to gain economies of scale.

SECTION 4 Past experience

In Lincolnshire, a long-term and consistent approach has been taken to the development of Call Connect, which complements the mainline InterConnect services. Services have been integrated with special educational needs, adult social care and community transport and economies of scale achieved through the expansion of Call Connect (including to neighbouring areas) and back office functions being used to manage DRT services for other authorities in addition to Lincolnshire.

Another demand responsive service that has developed over a period of years is Bwcabus in south west Wales, and which is discussed in the accompanying case study.

Qualitative research undertaken in Worcestershire, Suffolk and Hampshire, sought to understand the impact of the introduction of DRT on passengers, particularly where these replaced conventional bus services.³² Overall, any DRT service was welcomed where the alternative was complete loss of public transport. Fares, even amongst concession holders, were accepted as reasonable if it helped to sustain the service. As most of the users were older people, they were better able to accommodate the limitations of the services.

Case study: Bwcabus

In Wales, the Bwcabus DRT service has been developed in partnership with three local authorities - Carmarthenshire, Pembrokeshire and Ceredigion. Bwcabus is currently part of a wider project (LINC) that seeks to integrate more with the TrawsCymru network (with three-year funding from the European Agricultural Fund for Rural Development). This project aims to develop an integrated network across South West Wales to better meet the needs of rural communities and reduce social exclusion.

Bwcabus was conceived in 2005 and introduced in 2009 with Welsh Government, local authority and European funding to improve rural accessibility. It expanded in 2011 to cover a wider area.

The service operates Monday to Saturday from 0700 to 1900. Bookings are taken by Traveline Cymru seven-days per week from 0700 to 1900. Journeys must be pre-booked by 1900 for travel the next day before 1400, and by 1130 for travel that day after 1400. Travel between and within rural areas within the Bwcabus Zone is permitted or to interchange points for connections with inter-urban services. Fares are in line with ordinary bus fares.

In 2017, Bwcabus was extended to serve some additional villages. Where there are established patterns of regular demand, Bwcabus runs fixed route timetable services on certain days of the week where no pre-booking is necessary. Elsewhere, it operates flexibly and responds to requests.

Evaluation of Bwcabus has shown how an integrated approach can improve accessibility, encourage less car use and lift communities out of deprivation. Bwcabus has reduced average journey time to nearest employment centre from 52 to 27 minutes. It has also improved access to GP surgeries and helped to reduce calls for

home visits by doctors. In 2013, 48 per cent of survey respondents said they had reduced car trips by using the service. Passenger journeys increased from 4,500 in 2009 to 26,900 in 2013. Some services that started as one day per week have grown to several days. In 2014, 45 per cent of users were aged over 60 years and 22 per cent were under 25.

A reasonable proportion of users are reported to interchange with main bus services to get to hospital, work and college. It is hoped to improve confidence in interchanging with the introduction of direct communication between DRT vehicles and buses on main routes.

Several lessons have been learned from the development of Bwcabus:

- There is no single model of provision; there needs to be flexibility to best meet local needs (fixed and flexible route, and sometimes with some transition arrangements to move from fixed to flexible)
- Services operate best when based on a small town, which provides a focus
- Services cannot run in isolation and need to be part of a wider network
- Community engagement is important to understand needs and develop understanding of the service, so that people have confidence in it. Identifying local travel champions can be helpful
- Partnerships with other interested parties (e.g. GPs, health boards, Welsh Ambulance Service and community transport providers) are important in highlighting opportunities
- Drivers are key in making the service work, gathering local intelligence and being advocates for the services. Users value the social contact with drivers
- Branding and overall coordination and information sharing are important
- It takes time for services to become established and usage to build.

Whilst recognising the value of Bwcabus to those who use it, there has been debate in Wales about the value for money offered by the service. Some have suggested that it is an expensive service. The Welsh Assembly's Enterprise and Business Committee³³ was unable to reach a firm conclusion about value for money. However, it felt that if it could be shown as cost-effective then there was a compelling case for such services to be replicated in other rural areas. Indeed, such services do already exist elsewhere, such as Grass Routes in Monmouthshire, which is provided in-house by the authority. Up to 14 buses might run on any given day across the county, with vehicles driven by a mix of paid and volunteer drivers. Many of the vehicles are also used to provide school transport.

In March 2011, the DfT provided £10 million to rural authorities for community transport development, possibly as a way of mitigating the impacts of bus service reductions. Some authorities used the funding to help develop community transport partnerships, with the aim of achieving greater joint working between groups and in some cases common branding and single points of enquiry. In Buckinghamshire, for example, work was undertaken to try and coordinate community transport activities through the creation of a hub, with details of all available community transport services and a single number for enquiries. However, in doing this, it was noted that some community transport organisations were very independent and resistant to co-ordinated approaches for fear of losing their identity.³⁴ Elsewhere, such as in the Forest of Dean, four community transport providers have successfully come together under a common brand of 'Forest Routes' (a Lottery funded partnership), whilst each maintaining their own individual identities. The Partnership raises awareness of community transport, promotes the services of the organisations and helps to recruit volunteers.³⁵

More recently, similar work has been undertaken as part of some of the Total Transport pilot projects funded by DfT between 2015 and 2017. In north east Lincolnshire, a single manual for the recruitment and training of volunteers across different transport schemes was devised. In Warwickshire, the County Council worked with its community transport providers to develop a countywide approach to volunteer recruitment.

In the last five years, the DfT invited community transport operators, through two rounds of funding, to make applications for new minibuses, showing how they met various criteria including meeting State Aid restrictions. 350 new minibuses were provided to 300 different organisations in the first round, whilst a pot of £2 million was made available in the second round in 2016 to provide a minibus to each of 40 organisations.

Over the years there have been many initiatives and different funding streams and the UK has seen considerable innovation in addressing rural transport issues. However, some have argued that there has been too much experimentation and change, with short-term support and inconsistent approaches. This is compared with other European countries that have taken long-term consistent approaches that provide stable services.³⁶

Key points:

- Long-term, consistent funding is important for maintaining and developing rural public transport services
- Large scale initiatives allow economies of scale to be achieved, which helps to improve the viability of rural public transport
- Collaboration can be helpful in achieving cost-effective transport solutions
- A range of different types of transport service, operated by different types of provider, are important in responding to local circumstances
- Demand responsive transport will form an important element of future rural transport solutions, with an ability to meet demands that were not previously met by conventional services. However, there are various models of DRT which need to be deployed according to local needs
- Inter-urban services will form the backbone of rural bus networks, calling at hubs that are served by feeder DRT services.

5. Recent initiatives

Today, a patchwork of different forms and types of public transport exist across rural areas. This is a function of historic circumstances, bus operator decisions, previous initiatives, local authority commitment and support, and levels of community interest and involvement. Many areas continue to benefit from commercial (or partially-supported) inter-urban services and other supported rural bus services that are underpinned by the fulfilment of transport for school pupils entitled to free transport.

However, the more marginal of those commercial services are being questioned by operators, who are under pressure from falling usage and revenue and rising costs. Some of these services have been amended many times over the years to try and make them as operationally efficient as possible, but this may have been at the expense of providing services that best meet users' needs. As well as the pressures on commercial services, the last few years have seen intense scrutiny of supported bus services due to reduced local authority budgets.

Some local authorities have remained supportive of bus services and maintained funding levels; others have significantly reduced their funding. Many areas have seen reductions in services, particularly in the evening and on Sunday. In some areas, operators have continued to provide certain previously-supported services, albeit with some modifications to reduce costs, on a partial or fully commercial basis. Time will tell how sustainable these 'compromised' services turn out to be.

In some areas, decisions to cut budgets were taken quickly and there was little time to take any mitigating action. Other authorities had more time to implement cuts to budgets, which gave the opportunity for a more considered approach, with detailed public consultation and the chance to work with bus and community transport operators to develop alternative lower cost options that would mean that communities retained some form of service. In some cases, alternative funding sources have been found, including support from parish or town councils. Authorities, such as Staffordshire County Council and the East Riding of Yorkshire, point to the importance of involving communities and users in decision making around service changes and reductions, in order that alternative services provided are designed to best meet their needs.

Some areas have few operators that are interested in running public transport services. Many traditional family bus and coach firms have disappeared. Some local authorities have looked to use their own in-house vehicles to provide local bus services alongside social care and education transport provision. West Berkshire Council, for example, has recently started operating several local bus services with its own fleet, following a 55 per cent cut in its budget for local bus service support. Likewise, Monmouthshire County Council has built up its fleet to provide a mix of school and local bus services, including its extensive Grass Routes demand responsive service.

Local authorities tend to procure local bus services on a route by route basis with individual contracts. De minimis arrangements may be used to help fund a service that an operator sees as partially commercial. Generally, authorities set out detailed specifications for the route and timetable. Some authorities have tried different approaches. A few years ago, Bedford Borough Council used an outcome-based

approach to the procurement of all rural transport services in the rural area north of Bedford, asking operators to set out proposals for the services they would provide for certain levels of funding. Their proposals were then assessed on the basis of cost and levels of service offered for different communities.

Deeper rural areas are served by a mix of basic one or two days per week services to their local market town, DRT (minibus or shared taxi) or community transport (either minibus or volunteer car schemes). Most of these rely, to some extent at least, on local authority funding. Equally, in recent times, some of these services have been amended to reduce costs. Market day services may have moved from commercial operators to community transport providers or been subsumed into DRT services.

DRT has developed in many areas. Again, this takes many different forms and may be operated by commercial, public or voluntary sector providers, with a variety of different operating, booking, scheduling and fares arrangements. Some users have been resistant to DRT, even if they provide more travel opportunities compared to market day buses, because of the need to book in advance, which removes any spontaneity in deciding whether to travel. Furthermore, users may have trouble in using the service for GP appointments that often have to be made on the day. However, demand responsive services do open up opportunities for journeys that couldn't previously be made by conventional bus. The way that these services are marketed and portrayed is important, as often there is a perception that they exist only for older and disabled people, rather than being available to all.

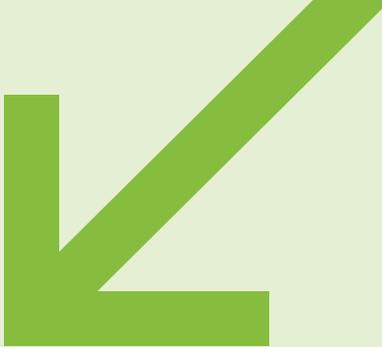
A host of different community transport organisations provide transport in rural areas. Again, these vary in size and type, operating area and types of service offered. Some operate minibuses under section 19 and 22 permits, others have PSV operator licences, whilst others provide only lifeline volunteer car services. Some cater for particular groups of people, such as offering dial-a-ride services to older and disabled people who are unable to use conventional public transport. Some cater for particular types of journeys, such as taking people to medical appointments.

In Essex, the Coggeshall Community Bus (established in 1982 and operating under a section 22 permit) provides a feeder service between Coggeshall and Kelvedon railway station for commuters on weekdays, as well as operating some shopper services on certain days. Given the type of service it is providing, it starts at 0615 in the morning and operates until 1935 in the evening, highlighting what can be achieved with volunteers.³⁷

In West Oxfordshire, the *OurBus Bartons* minibus was launched in 2016 in response to cuts in rural bus services and with significant community involvement and support.³⁸ The following year it added a second minibus. It operates nine routes, including a Monday to Friday commuter run, offering connections with trains at Lower Heyford railway station.

In Scotland, following the withdrawal of a commercial service between Bo'ness and Edinburgh in 2015, the Bo'ness and Area Community Bus Association (BACBA) was formed with the aim of running a replacement minibus service.³⁹ It operates Monday to Saturday, offering three or four round trips per day between Bo'ness, Blackness and Edinburgh. Operating under a section 22 permit, the service is provided with two paid drivers, overseen by a voluntary trustee board.⁴⁰

Community transport organisations may be funded in a host of different ways, including



Case study: Cornwall⁴¹

Cornwall County Council has taken a consistent approach to the support of public transport, with a current revenue budget of £7 million. It has recognised the need to maintain rural bus services to achieve the benefits of access to facilities, employment and education and resisted making budget cuts such have been made elsewhere. Furthermore, this position has been strengthened through the vision for a 'one public transport network for Cornwall', which emerged from the Devolution Deal between Government and the County Council. One of the key elements of this is the commitment of the new rail franchise for two trains per hour between Penzance and Plymouth, although this may impact on parallel inter-urban bus services. However, it should provide the backbone of the public transport network, with opportunities for buses to connect with trains at rail stations along the route.

Capital monies have been available to establish smart ticketing on all buses, plus enhancements to bus stations and passenger facilities at bus stops to improve the overall image of public transport. As a result of the local authority investment in public transport, bus operators have upgraded their fleets. There is a desire to develop greater bus/rail interchange, including multi-modal ticketing.

Options for the approach to the future support and development of the bus network include franchising or enhanced partnerships, offered by the Bus Services Act 2017. These different approaches are under discussion with bus operators, together with requests for data sharing (which some operators are cautious about). Equally, opportunities to reshape the network have been considered, including enhancing core services; however, the latter would require increased revenue funding.

There has been pressure on reimbursement to operators for concessionary travel. In response, operators have increased single fares, particularly for relatively short journeys.

It is recognised that revenue support will always be important in the provision of rural public transport. Approaches taken to bus service provision seek to achieve this in the most cost-effective way. Many rural bus services are based around statutory school transport requirements. Equally, community transport is provided by 15 different independent groups. Again, some of these have been able to provide cost-effective (albeit still supported) off-peak services, such as Hayle town service on the back of a school service. Integration of different budgets and provision are seen as important, with one team responsible for transport arrangements and decisions in order to achieve economies of scale.

grants, charitable trusts and funds, contracts and fares. Some authorities have moved away from giving grants and instead require organisations to tender for particular service provision.

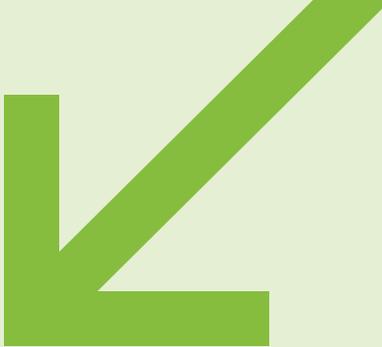
While there are many good examples of local transport initiatives, there is a limit to what they can achieve on their own because of their scale. For example, community transport services may be timetabled to connect with bus or rail services, but it is unlikely that they will have any influence over the timetables of those services or the ability to achieve through ticketing. Such things require a framework or directive to have been agreed as part of broader strategy.

Overall, there is a lack of any sense of a 'network' in rural areas, with different operators responsible for different services, limited coordination and lack of integrated ticketing. Bus stop infrastructure is often minimal, with limited information provision in many locations. Rural areas have been neglected in recent years as attention has focused on public transport in urban areas. This has been intensified by the creation of Combined Authorities and the emphasis on economic growth and regional and inter-regional connectivity. Quality Bus Partnerships generally cover urban bus networks and it is these areas that benefit most from investment by operators in vehicles and local authorities in infrastructure improvements.

Some recent developments perhaps suggest that there is a new phase for public transport development, including opportunities in rural areas. A number of English local authorities (including Kent and Norfolk) that were planning possible cuts to bus support budgets have decided not to proceed with these, recognising the importance of public transport to maintaining accessibility and avoiding social isolation. Others, whilst having made some reductions are now looking for innovative approaches to the provision of remaining services.⁴²

Meanwhile the Bus Services Act 2017, offers opportunities to develop bus services through franchising or new types of partnerships between local authorities and operators. Similar legislation for Scotland is being pursued by the Scottish Parliament. Meanwhile, in Wales, the Government has been setting out potential models for future bus provision, including franchising (competitive tendering of the network), the reintroduction of municipal bus companies (with local authorities operating services themselves) or continuation of the deregulated marketplace. It suggests that increasingly the public transport network will be owned and operated by Transport for Wales.⁴³ There has also been a suggestion that local authorities might only continue to receive BSSG towards the support of bus services if they at least match the amount with their own funding. If implemented, this will help maintain overall funding for supported bus services, recognising the importance of continued funding for rural public transport.

With declining patronage, bus operators have looked to introduce efficiency measures. Services have been reviewed and cut back, or smaller vehicles introduced. Operators have retrenched to core urban and inter-urban routes. In parallel, they have been considering the role of more on-demand types of service, with Arriva providing its Arriva Click service.



Case study: Staffordshire⁴⁴

Staffordshire County Council dealt with cuts in its supported bus budget from £2.015 million to £0.6 million (it also receives £0.7 million in BSOG for supported services). A considered approach was taken to this, working closely with elected members, communities and operators. It was noted that to achieve good outcomes, a good level of staff resource was necessary.

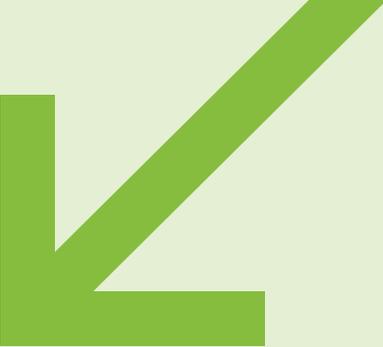
Many of the service changes were introduced from April 2018. Whilst evening and Sunday services were withdrawn with the loss of support, operators did maintain some previously supported journeys either commercially or with small de minimis arrangements. Furthermore, several parish councils have set a precept to raise monies to support bus services; others have provided one-off funding to support public transport.

It has been noted that where some bus services have been withdrawn, there has been a need to arrange dedicated school transport services. This means that all vehicle overheads may fall on school transport, ultimately leading to increased costs on education transport budgets. Equally, where bus operators no longer need to open their depots on Sundays, it may mean that overheads have to be borne by the other six days of the week, so increasing the cost of providing services on those days, which may impact on services that are only marginally commercial.

Connect demand responsive services also saw reductions. On the Moorlands Connect service, fares were increased to £3 single and £5 return. Charges for concessionary pass holders had been introduced a while ago too, and these were increased to the new full fare rate this year, a move supported by the community in recognition of the value it placed on the service.

Recognising the importance of community transport in meeting needs, the County Council has continued to provide grants to 22 operators. Organisations with minibuses have been encouraged to set up trading arms and obtain a PSV O licence, which will provide greater freedom for them to undertake all types of work to generate revenue, which can be used to help support the provision of social transport.

It is noted that funding for rural public transport is disparate and doesn't necessarily fit together very well. Furthermore, some funding, such as that generated under section 106 agreements from new development, is linked to urban settings and cannot be accessed for rural transport.



Case study: volunteer car services⁴⁵

Volunteer car services are where people use their own cars on a voluntary basis to provide transport for others, where payment is made to cover the vehicle running costs. Such services are available in many areas and take many forms. Whilst some do operate in urban areas, the main demand for them is in rural areas, where other travel options do not exist. Some are very localised, perhaps operating from a certain village as part of a good neighbour scheme; others operate across wide areas as part of area or district based community transport organisations. Some schemes involve informal lift-giving; others are formalised with driver vetting and vehicle checking procedures, a coordinator who receives bookings and allocates these to drivers with agreed payment arrangements.

Many volunteer car services focus on the provision of journeys for medical appointments, particularly for users who are not eligible for non-emergency patient transport (NEPT). However, there is evidence of some people who are eligible choosing to use and pay for a volunteer car service because of the certainty in timings and more personalised service offered than NEPT. Some NEPT providers also use their own volunteer car drivers to provide patient transport; some also contract with community transport operators to provide journeys for them.

Volunteer car services featured within various local authority Total Transport projects. The opportunity was taken to collect information from 17 authorities, to try and understand the context in which they operate and assess the extent to which they represent an effective solution or an inadequate fix for an imperfect system. The main beneficiaries of car services are older and disabled people.

It was noted that priority was often given to journeys to health appointments. Various reasons were given for this:

- People were travelling to unfamiliar destinations that were not necessarily convenient for public transport
- Centralisation of health facilities means that appointments may be at distant locations, which would be costly to reach by taxi
- Hospitals can be very large sites that are difficult to navigate
- The need to get there for a specific appointment time, coupled with the uncertainty of waiting and treatment times
- People may be already anxious about their health or the medical procedure they will be undergoing, without having concerns about travel too
- Treatments may make people feel unwell, such that travelling by public transport or waiting for public transport may be difficult.

With the emphasis on health journeys, the concern is that other types of journeys, such as shopping, may not be fulfilled. Indeed, it is likely that volunteer car services only meet a proportion of journeys, raising questions about what happens to people who can't afford to use the service (45p per mile is a standard charge), who want to travel to different types of destinations, people who don't know about the service, young people who don't think it is for them (and in some cases who are specifically excluded), or to those who live in areas where no service exists. Services are resource intensive, because drivers may stay with people (or wait for them) at their destination. Equally, there are times when volunteers do not want to make themselves available, making it difficult to meet the requirements of a 24/7 health service.

Volunteer car services often report the dilemma of matching supply and demand. They may be concerned about promoting themselves, in case requests for travel exceed available drivers. Equally, when drivers are recruited, there is a need to meet their expectations about levels of activity they wish to undertake.

Some car schemes operate as part of wider community transport organisations, such that users' needs can be met by the most appropriate service. However, many car schemes operate in isolation and lack any coordination with other types of transport. Therefore, they are used to provide end-to-end transport, rather than conveying people to the nearest bus stop. Examples of car services choosing not to coordinate passenger journeys have been known, because passengers might expect the cheaper cost (resulting from shared transport) every time. Further cost variations may occur in different areas due to discounts resulting from inclusion in the concessionary fares scheme.

The advantages and disadvantages associated with volunteer car services are as follows:

Advantages	Disadvantages
Personalised service	Uncoordinated provision
Responsive to need	Inconsistent service levels
Affordability	Piecemeal
Caring element	Volunteer recruitment

Volunteer car services clearly have a part to play in the future provision of rural public transport. The research concluded that there were some areas of improvement that should be considered as follows:

- The need for greater coordination of different journeys for different purposes across different providers, such that the most effective solutions can be deployed in response to needs and individual car services can benefit from wider experience and economies of scale
- Less distinction between eligible and ineligible NEPT journeys, as the needs are often the same and opportunities exist to convey different users together
- Operating boundaries of services would be better determined with a view to achieving more comprehensive coverage and greater coordination, rather than constrained by localised and insular factors
- Medical appointment times need to be set with some reference to transport, to improve transport efficiency and customer service
- Reform how NEPT is arranged and provided to achieve efficient, cost-effective transport solutions.

Some industry figures are encouraging operators to think carefully about the future, recognise that the world is changing and to drive the future agenda, rather than merely cutting back services and hoping for the best.⁴⁶

Table 4 below provides an overview of the current position regarding rural bus provision, based on the findings of this research and a professional viewpoint from experience in the industry.

Table 4: Summary analysis of current position of rural bus provision

Strengths	Weaknesses
<ul style="list-style-type: none"> • A lot of different sorts of transport are running around (with significant amounts of spending) • Examples of some successful approaches exist • Legislation requires local authorities to have regard to the travel needs of their residents • Local authorities are well-placed to play a key role in rural public transport • Growing recognition of the importance of continued support for rural public transport by some local authorities. 	<ul style="list-style-type: none"> • Fragmented provision, which is viewed separately from wider public transport network • Viewed as secondary to urban provision • Dispersed/limited demand, so not seen as important • Not the responsibility of any one party • Different levels of interest by communities • History of short-term initiatives with varying objectives • Provision has been compromised over time to save money, leaving limited 'lifeline' services • Transport not integrated with wider considerations of health and wellbeing • Fails to fully support wider policy objectives of social inclusion, such as the provision of concessionary travel • Not attractive to new emerging models of provision.
Opportunities	Threats
<ul style="list-style-type: none"> • Needs for transport will continue to exist • Could build on some initiatives/ principles that are recognised and have been tested (e.g. Total Transport) • Improved access has wider positive benefits (e.g. ability to participate and have social interaction, remain independent and avoid having assistance at home) • Use technology to help plan and provide transport services more efficiently and effectively. 	<ul style="list-style-type: none"> • Complete loss of provision by allowing continued gradual demise through lack of any management to the situation • Potential users deterred by inadequate services, thus reducing demand further • Short-term initiatives rather than long term planning and ongoing consistent positive action • Action taken too late.

The analysis provides insights into the strengths and opportunities that need to be built upon to take rural public transport forward. It also lists the weaknesses and threats that may need to be addressed. It is important to recognise that there is no single way forward. Future services need to be tailored to local circumstances, taking account of specific needs and demands, community interests and operating environment. A consistent and long-term approach needs to be adopted, providing certainty for existing and potential users. Local authorities will be best placed to lead and to coordinate the way forward, building partnerships with other organisations and operators, given their significant involvement in various aspects of transport, including education and social care.

Key points:

- Local communities need to be involved in decisions about, and the development of, rural public transport services
- Different types of provision need to be embraced and encouraged, including demand responsive transport, community transport, taxis and local authority in-house fleets
- Alternative forms of procurement may be useful in encouraging innovation and ideas
- It is important to create a sense of 'network' in order to help with visibility and promotion
- The Bus Services Act 2017 offers opportunities to try new models of provision, either partnership or franchising
- Integration of different budgets is important in taking a holistic approach
- Capital funding for infrastructure is important to complement revenue support for actual provision of service
- Rural DRT services are valued and people will pay for them, even if they are concession pass holders
- Volunteer car services have the potential to be more integrated with other types of provision
- The provision of non-emergency patient transport should be reformed, so that it can be integrated with other types of passenger transport.

6. Experience elsewhere

Netherlands

In the Netherlands, transport policies (Regional Public Transport Strategies) are linked to land use planning. Public transport is viewed as having great social value and there is a strong commitment to integration, in respect of planned interchange and a national fares and ticketing system. Since the Passenger Transport Act 2000, goals have been to increase ridership and to see higher levels of cost coverage. Local transport authorities award large contracts for the provision of public transport in their areas, following competitive tender. Franchises may be specific or objective led, although over time there has been a tendency towards less freedom for operators to use creativity. However, with revenue risk on the operator, some contracts include incentives. In some cases, specialist transport has been integrated into mainstream public transport.⁴⁷

In 2016, Arriva was awarded a 15 year contract to provide bus and train services in the province of Limburg.⁴⁸ This involves the operation of 50 trains and 230 buses, including the city network in Maastricht. The contract is not overly prescriptive, but instead specifies a number of desired outcomes. Part of the desire for the network to be redesigned was to address changing needs of an ageing population but also to try and stem the movement of young people away from the area. The operator developed the network jointly with the Passenger Transport Authority. In some rural areas, the operator was asked to suggest possible solutions.

As a net cost contract, the operator receives a fixed subsidy. Therefore, it has to manage the network in a way to maximise revenue and therefore still acts in a commercial way, even though there are limitations as to the actions it can choose to take (i.e. contractually it has got to provide services for all areas specified). As such, it is important to view the network as a whole, as revenue from urban services will help to pay for rural services. Equally, ensuring that rural services connect with mainline services means that they generate usage and revenue for the main network.

In sparse rural areas, Arriva provides demand responsive transport that feeds to the main network. Bookings can be made via an app. In some cases, a dedicated minibus might be provided, but where demand is very low, a taxi might be sub-contracted to provide the services. For journeys back to the rural areas, the flexible transport vehicle will wait at the hub for the arriving bus or train and passengers will just transfer (no pre-booking is required). Based on the destinations of the passengers, the driver will decide the best route. As much as possible, barriers to interchange are eliminated to encourage usage.

If a service experienced significant reduced usage, the operator would be required to investigate the reasons and discuss these with local communities, before devising alternative solutions that would be discussed with the Passenger Transport Authority, as its support would be needed before a change could be made.

Operators are expected to liaise with communities on an informal basis about services. However, there is also a formal mechanism for engagement through customer boards.

A feature of Netherlands public transport is the Buurtbus. There are over 200 of these neighbourhood buses - 8-seater minibuses driven by volunteers and managed by local

committees, which operate regular all-day timetabled services that are fully integrated with the wider public transport network, including fares, connections and vehicles that are indistinguishable from those on the wider network.

The Buurtbus model was established in 1977 and has been continued within the structure of area-wide concessions for the provision of public transport services. Buurtbus services help to achieve the comprehensive accessibility objectives of regional transport strategies, some of which refer to a requirement to ensure that everyone, however remote, will have access to some form of public transport. Buurtbus is very much based on a partnership approach between three parties:

- **Commissioner** - provides the vehicle and infrastructure, together with a small grant to fund the expenses of the local committee, and approves the timetable and route
- **Concession holder** - responsible for vehicle maintenance, fuel and insurance, and promoting the service as part of the wider network
- **Buurtbus committee** - makes the grant application, recruits volunteers and manages the provision of the service.

The success of the Buurtbus model is built on the value placed on public transport by the Dutch population and the tradition of social action. There is no financial risk on the local management committee and the service is designed to meet the needs of the local community.⁴⁹

Germany

Over ten years ago, the German federal state of Hessen introduced a tendering regime for local bus services.⁵⁰ This is like the London model, where the authority is responsible for defining services and fares and takes the risk on revenue. Therefore, this differs from the Netherlands, where operators still retain a commercial interest in network even in an environment where there is a requirement to serve all areas.

Significant resource is required to plan, tender and manage the network.

The management of contracts and networks has added more than ten per cent to the cost of providing the services. The overall costs of provision have increased and the approach has not stemmed the decline in patronage. The way revenue is distributed favours urban services and the main corridors. The approach has not protected rural public transport, which has been cut back to reduce costs.

Sweden

In 2012, Sweden followed a competitive tendering approach to public transport provision. 22 regional public transport authorities were established, with responsibility for the development of public transport in their areas. They can make strategic decisions on public transport that are coordinated with other aspects of social planning, although there remains a disconnect with land use planning that is looked after on a more local basis. Regional Transport Supply Programmes (RTSP) cover both commercial services and those to be contracted. Based on its RTSP, an authority can define Public Service Obligations (PSO), which it guarantees to maintain, for services and declare which services it intends to submit to contract.

Goals include growing usage, increasing customer satisfaction, efficiency and greater profitability for operators. One of the public transport authorities, Vasttrafik, seeks to undertake its procurement function in a way that allows development of the

network without micro managing it. Contracts include incentives, with a proportion of remuneration based on the number of passengers. Bonuses are also offered for customer satisfaction.⁵¹

The public transport authority is responsible for specifying routes, frequencies and fares, and so the operator has limited opportunity to influence these. Contracts are typically for eight years and include incentives for operators to improve quality, promote services and increase usage.

Partnership and a network approach are both important principles. The authority and operator work together to achieve the best service possible, rather than it be a client/provider split. The two partners agree and use a joint business plan. The network is seen as a whole. Whilst investment is concentrated on high demand routes, the intention is that the benefits filter down to the wider network. Therefore, revenue growth on core services helps to support weaker parts of the network, such as rural services. This avoids fragmentation of the network.

Comparisons between the UK and Switzerland, Germany and Sweden⁵²

Recent research “revealed a pattern of integrated bus and rail services that is unheard of in the UK.” It showed how sparsely populated areas of the three other countries studied had ten or more buses per day, linking communities with local towns where onward links by rail were possible to larger urban centres. Common features were centralised planning of the network by regional transport authorities, clock-face timetabling with coordinated services, easy interchange between bus and rail and network-wide ticketing.

In Southern Germany, it pointed to the integrated taxi provision covering rural areas. On boarding a train from the city, passengers can book a taxi that is waiting for them at the station for onward travel to rural areas. A nominal fare is charged rather than the full taxi fare. In each of the other countries, the whole trip from end to end is guaranteed, removing any need for private transport.

The research concluded that there was no logistical reason why such provision couldn't exist in the UK. However, it would require rural transport to be afforded much greater political priority and funding, together with regulatory and legislative changes, which would see a move towards centralised planning and provision of local bus and rail services.

Key points:

- A strong commitment to the provision of public transport for all is important
- Holistic approaches to network planning and service integration are key; rural and urban services all form part of the same network
- Central planning does require resources, either within the transport authority or the operator
- Approaches need to incentivise operators to develop services and grow usage. Operators need to see the importance of encouraging use of rural services to feed more users onto the main network
- Taxis need to be part of the overall picture of provision.

7. Future needs and considerations

Various pieces of research have shown how cars are considered a fundamental necessity in rural areas. In 1998, 89 per cent of households in rural Scotland had access to a car. Over 76 per cent of all journeys were made by car. Research into car dependence showed that the strongest determinant of car ownership was isolation from services.⁵³

Even the least affluent households in the remotest areas ran a car, although they only used it for necessary trips, such as to get to and from work. More affluent households made more journeys by car and travelled further. The car was seen as crucial to attaining and maintaining employment.

Many rural dwellers without access to a car were forced to be dependent on friends and relatives for lifts to work and shopping. Mobility deprived people without access to cars were found to be particularly vulnerable to the loss of rural facilities due to their inability to adjust their life patterns.

Rural dwellers were found to be unwilling or unable to consider public transport as an alternative. Indeed, buses were used for just 2.2 per cent of journeys in rural areas.

Research by the RAC Foundation⁵⁴ showed the significant impact on low income households of having to run a car. In 2012 it estimated that 800,000 car owning households spent at least 31 per cent of their disposable income on buying and running a vehicle. These were families within the lowest tenth of household incomes. They would sacrifice expenditure on other things to remain mobile. Generally, cost of transport was a big hurdle to taking up employment.

Despite the current decline in journeys generally, there will continue to be a need for transport in the future. However, people's needs and expectations of how transport is provided will be shaped by various factors. Transport Focus⁵⁵ suggested these would be as follows:

- A growing and older population
- Splintering social structures - increase in one person households
- Environmental squeeze - people will think harder about travel
- End of assumed affluence - different ideas of 'value'
- Blurred boundaries between work and leisure, online and offline - 24/7 society
- Shifting balances of power - empowerment of individuals, who are less trusting of organisations
- Feminisation of society - flexible working patterns, consideration of health and wellbeing.

It was considered that the above would translate into the following characteristics of future transport, described in Table 5 overleaf.

Table 5: Characteristics of future transport

Characteristic	Outcome
Customised and flowing experience	More bespoke and individualised information and services; easy to find out about and to use
Collaborative travel	Users work with providers; peer to peer advice and assistance; incentives and rewards
Useful mobility	Public transport infrastructure and journeys valuable for productive activity
Going local	More frequent local journeys; transport hubs more integrated with surroundings
Considered and constrained travellers	Fewer and shorter journeys, possibly more suited to public transport
Public transport as app	Technology an ally with transport (information, on demand, feedback)
Emotional journeys	Pre-journey as important as journey, ensuring people's moods are safeguarded
Public and private transport mash up	Journeys not modes; less 'ownership' of transport; mix of private and public transport; spectrum of options with seamless transfer

Source: Transport Focus

The changes in the way people might travel in the future are likely to have different impacts in urban and rural areas. Younger people will continue to be drawn to cities, where housing will be more affordable and there are opportunities to integrate activities and socialise. Transport is likely to be more collaborative, customised and based on shared ownership. Overall, there will be an emphasis on journeys rather than the modes, and the distinction between private and public transport will become blurred (as already seen in the development of the concept of Mobility as a Service). Public transport infrastructure might have greater value, providing hubs for activity and working. Equally, public transport may be attractive for the shorter journeys being made and in providing opportunities to do other activities whilst travelling. There will be an expectation of 24/7 availability of transport that provides flexible timeframes and where waiting time is minimised.

Rural areas are likely to continue to have older populations. There is unlikely to be a critical mass to support collaborative models of transport and so it is likely that these areas will retain a dependence on car ownership. This was the conclusion of a futures exercise in 2010,⁵⁶ which concluded that the car would remain dominant in rural areas. Therefore, car sharing would need to be part of the solution. However, it would also be important to ensure that there was a credible inter-urban bus network supplemented by DRT services. It also saw the need for the maintenance of local service outlets (one-stop shops or hubs), which would have multiple purposes to provide them as efficiently as possible.

Public transport will remain vital for groups that are less likely to have access to other modes of transport, including the following:

- Older people
- Younger people
- Disabled people
- Unemployed people
- Low income employees

Transport Focus undertook surveys amongst users of rural bus services in Herefordshire (market day services) and Shropshire (ShropshireLink DRT).⁵⁷ About half of all passengers said their use of the services accounted for all or most of their travel outside of the neighbourhood. If the services were not available, about half of those surveyed suggested that they would not be able to make the journey. 69 per cent of ShropshireLink users indicated that they had no car available. In both Herefordshire and Shropshire, 45 per cent of users had no one to ask for a lift if the bus service was not available.

The Royal Voluntary Service (RVS) highlighted the needs of older people.⁵⁸ By 2030 it suggested that there will be 7.8 million people over 75, three million higher than in 2013. Research undertaken by the organisation showed that 17 per cent of those aged over 75 didn't use public transport because it was not suitable for their disabilities. Furthermore, 18 per cent of that age group were unable to walk to the nearest public transport service. Given this situation, it considered that community transport was important, as it was well placed to meet individual needs and offered a more caring service, letting people take their time and with drivers and staff that were happy to have a chat.

Consideration of the unmet travel needs of older people showed that these were greater amongst those without a driving licence.⁵⁹ Where people stop driving, their preferred option is to get lifts from others. Two thirds of this group had lifts every week.

The car was seen as fundamental for personal wellbeing in rural areas, providing flexibility, autonomy and independence, particularly from the perspective of those with a car. For disabled people, the car was important in compensating for physical impairments. Car based solutions, such as voluntary car schemes, were seen as the best potential alternative to the car. There was a general reluctance to ask for lifts.

Other people's unmet travel needs were generally blamed on the inadequacy of public transport, most commonly stating that it was unsuitable or unavailable (i.e. too infrequent, unsuitable times or had poor connections).

More flexible transport services were viewed as preferable by the oldest older people, as they were able to benefit from door-to-door travel. However, lack of awareness of such services could be a problem. Furthermore, such services could become strongly associated with older people and impairment, such that it deters younger people from using the service.

SECTION 7

Future needs and considerations

Research undertaken by FutureGov in Essex and Suffolk sought to provide more insight into needs and demands for travel in rural areas, with the aim of defining the necessary attributes of a rural public transport service.⁶⁰ It saw the best opportunities for rural public transport to be:

- Meeting the needs of those with lower levels of independence (e.g. young people without access to a car; older people who no longer drive; one or no car families)
- Serving people who know in advance where and when they want to go
- Amongst those at a point of transition (e.g. change of job, commencement of education or training course, change in personal health).

As part of this research, the opportunity was taken to canvass the opinions of local government officers from several rural authorities that were involved in Total Transport pilots, considering what the future might hold for rural public transport.

There was agreement that the rural network would see further reductions as marginal commercial services no longer paid their way and local authorities could no longer afford to support replacements. The future network (considered in a holistic way) would be based on the provision of inter-urban bus services, with complementary demand responsive services. These would take a variety of forms and be operated by different types of operator depending on local circumstances. DRT provision will be aided significantly if it can incorporate different flows, including health transport (perhaps with responsibility for NEPT passing to local authorities). Equally, it would be helpful if taxi and private hire licensing was changed and dealt with by transport authorities, to help recognise them as part of overall public transport provision.

School transport is the largest area of expenditure on passenger transport in rural areas. For many years, the integration of school and public transport requirements has helped to support the provision of conventional bus services, with the school service covering the peak costs and rest of the service operated at marginal cost. With the reductions in local authority support for bus services, some of the public bus elements of service are being withdrawn. In some cases, this means that only the school transport service exists, which will have to meet the full cost of the vehicle. Therefore, as well as seeing the withdrawal of the bus service, such dis-integration will add cost to school transport provision.

Regardless of the type of provision and operator, it will be crucial to try and amalgamate demands to create all-day workings for vehicles and drivers, as that represents the best value for money. Integration of different requirements (Total Transport principles) is seen as very important to the maintenance of public transport services, as it does provide efficiencies.

It was considered impractical to adopt national standards of service, as local needs and circumstances were so different. Many rural areas have never had more than a minimal lifeline bus service. It is only as mobility has increased with car use that rural communities feel that those services are inadequate. However, there will never be sufficient funding available to provide passenger transport in rural areas that matches the accessibility offered by the car.

Whatever the model of provision, there is agreement that rural public transport will never be commercially viable and will need support, as there will not be a critical mass of demand. Furthermore, services will not be sufficiently attractive to generate usage. It will be necessary to minimise levels of support by seeking the most cost-effective solutions and optimising levels of usage. Recognising that services will require ongoing support, it would be useful if their stability was guaranteed by ringfenced funding. The case for this should be seen in terms of avoiding the costs of the negative impacts of social isolation.

Whilst the greatest need for support for public transport is in rural areas, these areas are less able to obtain certain funding streams. For example, section 106 monies tend to relate to developments to urban areas or urban fringe and grants to support new low emission vehicles go to urban areas, as that is where air quality issues exist. Furthermore, the greater use of buses generally in urban areas, means that those services gain a greater share of concessionary travel reimbursement.

Whilst community transport will undoubtedly play an important part in the future provision of rural transport, in its current form it will not be able to be a replacement for conventional bus services. It will be important to assist community transport operators to adapt to the changing environment. There may be need for some consolidation of provision in order to gain some economies of scale in sharing resources, become more resilient and better resourced to develop their services and engage with other parties.

Communities must be involved in the development and provision of rural transport services, particularly as some of the solutions may be very much based around self-help schemes. They can't be left just to their own voluntary efforts. Neither will it be appropriate to assume that community transport will fill the gaps, as that might not be the right answer.

It will be important to identify community champions. Local authorities will need to provide support to communities and invest time and effort into developing the most appropriate network and assisting operators to understand the part they can play in delivering services. Commercial operators should see that networks are being designed to help strengthen their mainline services to maintain their viability.

Driverless vehicles might be seen as a positive step towards cost effective rural public transport, in that they would remove the cost of the driver, one of the main cost elements of the service. However, it is felt that there are many issues to address before the technology can be reliably used to provide rural public transport. These include dealing with fares collection and the possibility of free riders, vehicle breakdowns, onboard antisocial behaviour and other emergencies.

Key points:

- There will be a continuing need for public transport in rural areas
- Services such as car clubs and car sharing will be part of the solution
- A Total Transport approach to the integrated planning and provision of all types of passenger transport is important
- Dedicated funding to support rural public transport will be required
- Some consolidation of community transport may be required to achieve economies of scale and viability, ensuring that organisations remain resilient.

8. Possible future models

Tendered Network Zones

In 2007, Campaign for Better Transport called on the Government to re-examine existing policies and regulations in order to attract passengers back to rural buses.⁶¹ It called for the development of planned and integrated rural networks offering high quality rural services. These would be collaboratively developed by local authorities and commercial operators, with strengthened core services and franchised supporting elements and called Tendered Network Zones (a concept originally put forward by the Association of Transport Coordinating Officers (ATCO)). All funding for the network, including BSOG, would be with the local authority, to achieve control over the network and greater stability. The Traffic Commissioner would cooperate with the local authority and refuse to register a commercial service if it undermined the network. Campaign for Better Transport felt that services within these networks could be further improved through Quality Partnerships, as applied in urban areas.

Campaign for Better Transport called on Government to allow Quality Contracts (or franchised networks) to be a realistic option for rural as well as urban authorities. This would mean that the local authority would plan the network, specifying the fares, frequencies, timings, routes and tickets. Bus operators would then bid to run the services specified.

Responding to research undertaken by the BBC into the falling use of buses, Dr John Disney of the Nottingham Business School is quoted as saying that a system of franchised networks is needed, together with an injection of £5 million per annum in each local authority to subsidise buses. Furthermore, he advocates means testing for concessionary travel to reduce the cost.⁶²

This type of approach is not new. Following bus deregulation, Gwynedd County Council supported much of its rural bus network. It used this control to develop a network approach, where services were timed to connect, area-wide ticketing was provided and services were branded and promoted as Bws Gwynedd, with all buses sporting red fronts. However, over time, bus operators cherry-picked the best performing elements and took those over commercially. Whilst good that they were seen as commercial propositions, the network concept was lost.

Inter-urban bus services

While rural buses have been in decline, inter-urban bus services have prospered. Such services have limited profile, their development and growth being largely down to local recognition. As such, Greengauge21 considered the role of inter-urban buses, looking at how they might play a greater role by examining several case studies.⁶³

The report highlights that inter-urban services have been on an upward trajectory for the last 20 years. It sees further opportunities to strengthen their role, for example through the use of technology and new services being created through crowd-sourcing. It concludes that inter-urban bus services have value and should be developed more strategically. It recommends that more attention be given to inter-urban services, with all relevant parties taking a part in their development. It suggests they should be properly planned as a network and in a way that fully integrates them with other services. There should be a way of deciding which services are strategically important and those services should have more surety than that afforded by the existing registration period, so that users have confidence in them.

Whilst painting a positive picture of inter-urban services, the report also points to the threat of competition from on-demand providers, such as Uber and Lyft, or MaaS, which have already impacted on urban bus usage. With balanced demand from both ends of a route, on-demand providers may well see the potential of offering a service, which would be viable if dead mileage could be avoided.

Demand Responsive Transport (DRT)

DRT has established itself as one element of rural public transport provision. There have been several challenges developing DRT in rural areas to date.⁶⁴ Firstly, its lack of visibility to the community, because it has no fixed route and may not have any physical infrastructure associated with it, such as bus stops. Secondly, it may be viewed as a service for older people and not considered as an option by other groups. Thirdly, it was necessary to operate services as efficiently as possible:

- Finding ways of filling spare seats by coordinating different passenger demands and promoting travel on journeys with available capacity
- Reducing dead mileage by developing more suppliers in rural areas; using vehicles to feed into the main network; and by developing two-way travel markets (such as visits to the countryside)
- Avoiding vehicle and driver downtime by effective scheduling, coordination of different requirements for different purposes and encouraging some flexibility in users' travel requests.

On-demand transport, as opposed to pre-booked DRT, is seen as a commercial opportunity for a number of providers, based on bookings via an app. Much of this development has been in response to the growth of Transportation Network Companies (TNCs), such as Uber and other car based services. Bus operators have now introduced minibus services, such as Slide and myfirstmile in Bristol and Arriva Click in Sittingbourne. They work in urban areas, where there is a critical mass of demand and operating areas are tight enough to guarantee transport will be available in a matter of minutes. These services threaten to undermine traditional taxi and PHV operators, which remain within a rigid licensing system. This provides further need to reform taxi licensing.

Arriva Click in Sittingbourne operates between the town centre and a business park. Users request a journey via an app and an offer is made, such as a vehicle will be there in eight minutes and the cost will be £3.50. The user then decides whether to accept

the offer. The service is designed to guarantee a maximum wait of 20 minutes. As a premium service, concessionary passes are not valid. The service has attracted people from other modes, with 20 per cent of users previously using taxis and 20 per cent cars.

On-demand transport is very much an urban concept, where there is lots of demand and lots of vehicles. Uber-type services alone won't work; urban areas will become too congested and such services will cease to be cost-effective. Therefore, it is suggested that future networks will include a combination of mass transit and on-demand transport.⁶⁵ Such an approach is likely to be the only way of meeting need in rural areas, as it would be too costly to have sufficient vehicles available to offer entirely on-demand. Furthermore, effective deployment of the on-demand vehicles mean that they should be used for short journeys within rural areas, feeding to main services.

Clearly, expectations on DRT provision in rural areas need to be managed, as it would be impractical to provide similar guaranteed maximum wait times to urban situations, unless there were many vehicles operating. Equally, a balance has to be found around the number of vehicles deployed and the demand for the service, particularly if the service is to be sufficiently attractive and relied upon for getting to and from work.⁶⁶

DRT takes many forms and there is no single model, but it can help meet the more diverse travel needs of modern society. It may provide end-to-end journeys, feeders, last-mile transport or meet the specific needs of particular groups. However, practitioners point to the need for DRT to be considered in the context of an overall network, rather than in isolation. Overall, it is important to keep existing passengers on public transport and not let them be put off by any instability. When people have stopped using public transport, it is difficult to win them back.⁶⁷

DRT offers the chance to rethink rural transport; people view it as something different and value having the service. Even concessionary travel holders are prepared to pay to use it. For example, on the Moorlands Connect service in Staffordshire they pay the ordinary fare of £3 single or £5 return. Users support this, as they wish to see the service continue.

Many users of current DRT services see the service as more than just transport. In a survey of users of the Kent Karrier service, 79 per cent of respondents said that it wasn't just a bus ride, but a chance to meet friends.⁶⁸ This highlights the social dimension of rural public transport. However, it also shows how the impression might be formed that such services are only for older people.

Another form of demand responsive service is one that comes through crowd sourcing or funding. This is where people request a particular trip, which is then promoted to others, with the aim of gaining sufficient interest for it to be viable. The more people that 'sign up', the cheaper the cost may be for all users. This approach is being used for excursions and development of fare-paying school transport routes (see govamooz.co.uk), but could be applied to regular rural demand responsive transport services.

In a report on DRT,⁶⁹ the Community Transport Association (CTA) considered that in future a greater proportion of passenger transport journeys would be demand-responsive. It suggested that DRT services needed to be designed to meet a variety of needs, to be efficient, and could look to be provided by different types of operators, including community transport. Services need to be part of a network and link with other services (i.e. first mile, last mile). Furthermore, services needed to be developed from the ground up, building on existing assets and rooted in the experiences of people who know the patch and the priorities.

Community transport

Community transport, in its various forms, is a significant provider of transport in rural areas, either operating minibus services or volunteer car schemes. It is estimated that over 600 organisations provide community transport across rural England, providing eight million passenger journeys. These organisations employ about 2,000 staff and use 48,000 volunteers.⁷⁰

With detailed local market knowledge and enthusiasm to serve their communities, community transport operators are well placed to provide the services that people want. Equally, they may have lower operating costs and the ability to harness volunteers (although this may be under threat from potential changes to the use of permits for minibus operation put forward by the DfT).

With the decline of rural bus services, some have argued that community transport could fill the gaps. However, community transport is not able to be self-sustaining in rural areas and requires support. Many operators are relatively small and the sector has little capacity to meet increased demands without investment. As such, community transport providers often meet specific needs or serve particular groups in the community, rather than offering a comprehensive public transport service. Therefore, calls by the House of Commons Rural Communities, Environment, Food & Rural Affairs Committee for “Defra to work with local authorities to ensure that alternative community transport schemes are investigated to replace local bus services that are to be withdrawn”⁷¹ seem rather unrealistic.

In Wales, the CTA's State of the Sector report highlighted the pressures on community transport through growth between 2010 and 2013, where the number of passenger journeys increased from 1.2 million to two million and passenger miles from 4.3 million to six million.⁷²

The role of taxis

It is recognised that rural transport requirements might be met by different types of transport, including bus, demand responsive minibuses, community transport and taxis. Campaign for Better Transport⁷³ called on taxi licensing to become a function of the local transport authority, to encourage the use of taxis as rural public transport services.

Taxis are often overlooked as public transport services. Yet they are important because of the growth in the 24/7 economy and the demise of bus services. They are used by all sections of society. Practitioners have called for change to enable taxis to play a greater role in public transport, including simplification of the legislation and removal of the distinction between hackney carriage and private hire vehicles. New technology offers the opportunity to integrate taxis more.⁷⁴

In 2008, the Commission for Integrated Transport put forward a new approach to rural public transport, based around widespread use of taxis, as found in parts of the Netherlands and Switzerland.⁷⁵ It suggested that the UK would benefit from large-scale demand responsive services, based on small vehicles providing shared transport, as seen in other countries, where there are much lower subsidy costs per trip than the locally organised schemes that operated in the UK. In the other countries studied, services were a mix of fixed and flexible, with pre-booking up to an hour beforehand. In many cases they operated from early morning to late evening and on seven days per week. Ticketing was integrated with conventional public transport and services designed to connect with buses and trains.

The report called for such provision to be introduced in rural areas of the UK, perhaps on the scale of a shire county. However, it envisaged that new relationships would be needed with taxi operators, that licensing and regulation would need to move to a higher geographical level and public subsidies for transport should be applied differently to ensure a level playing field among different types of operators.

Bob Saxby, a former local authority transport coordinator and chair of ATCO, in an unpublished article, considered the use of 8-seat taxis as a replacement for buses on rural services, based on experience in North West Wales.⁷⁶ He concluded that taxis have limitations, particularly in respect of capacity, and could be as costly as running minibuses, given that the main cost of a driver is much the same for both. Whilst pre-booking (often the day before) may avoid the capacity problems, Saxby suggested that the evidence showed that this could deter usage, as it removed spontaneity. Furthermore, he questioned the potential of more on-demand services to be cost effective in rural areas, given distances and the relative dispersed demand. If taxis are to be successful in providing cost-effective rural public transport, he argues that it will be important to try and find sufficient work to create complete workings for vehicles and drivers, just has been the tried and tested method for larger vehicles.

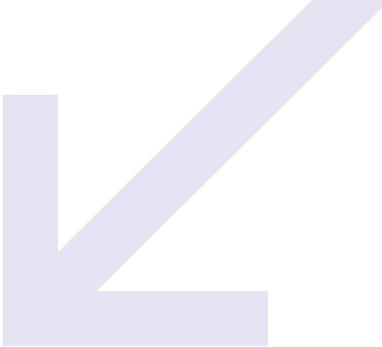
Certainly, examination of some of the well-established rural DRT services, such as DaRT in Essex and Call Connect in Lincolnshire, suggest that this is important. DRT vehicles are involved in the provision of transport for pupils or students as part of their schedules, either transporting directly to the school or college, or providing feeder services to mainline bus routes.

Rural Travel Hubs

Rural Travel Hubs are currently being developed at three sites by the Greater Cambridge Partnership, with the aim of reducing private car journeys into Cambridge from surrounding villages.⁷⁷ A hub is defined as a transport facility that serves as an interchange, close to existing transport corridors (that are served by a reliable and frequent public transport service), where residents in rural areas can walk, cycle or drive to and continue their onward journey using a sustainable mode of travel. The intention is to build on the experience of the informal travel hub that developed at the Swavesey guided busway stop.

The consultation with communities regarding hubs showed a desire for more public transport improvements in rural areas, such as better interconnectivity between neighbouring towns and villages and to locations other than Cambridge. Therefore, it is seen as important to link with DRT and community transport.

Hubs will be designed to meet specific local requirements, but will generally include car and cycle parking and bus interchange and passenger facilities, including real time information.



Total Transport

The phrase 'Total Transport' has been used in various contexts over recent years. It encapsulates the idea of taking a holistic view of all passenger transport, gaining efficiencies and effective service provision from an integrated approach. Local authorities have long recognised the benefits of such integration and indeed were required to take a comprehensive view of their expenditure on public, education and social care transport with a view to achieving best value in the Transport Act 1985. Most authorities integrated public and school transport many years ago and then have moved on to more specialist types of transport (SEN and social care) to varying degrees.

Campaign for Better Transport in 2003⁷⁸ suggested that rural transport was not working. Communities had poor access to facilities, there were no evening and Sunday buses and many households were forced to run two cars when they couldn't really afford to do so. From evidence in other countries, it concluded that the current system in Britain was too disjointed, with no overall planning. It called for a franchised (Quality Contract) approach, with physical integration of services and ticketing. It suggested the reform of taxi licensing, such that taxis were seen more as a public transport service. It also called on other solutions including fixed route taxibuses (that would only operate if pre-booked), DRT services that combined specialist and public transport requirements and rural car clubs.

In 2011, the House of Commons Transport Committee⁷⁹ suggested that local authorities could look to reduce costs through better coordination, planning and delivery of different types of service, recommending that Government should identify ways to overcome regulatory or legislative barriers to coordination. It suggested that partnerships between local authorities, commercial and community transport operators should be improved. It also noted that whilst concessionary travel was highly valued, there may be a case for a one-off charge for the pass. Also, in areas without conventional bus services, it called on the possible extension of concessionary travel to community transport.

Urban Transport Group promoted the term *Total Transport* and it was also used by the Minister in her evidence to the House of Commons Transport Committee inquiry into passenger transport in isolated communities.⁸⁰ The Committee was concerned about the decline in rural public transport and the disproportionate effect on groups who did not have access to a car (as it had been in its previous inquiry into bus services in 2011). It recommended that the DfT should show some strategic leadership in addressing rural transport issues. It also warned against relying on community transport to fill the gaps left by the withdrawal of bus services. The Committee suggested that the Total Transport concept could revolutionise transport for rural communities. It recommended that the DfT should fund some pilot Total Transport projects, which it did in 2015. Thirty-seven local authorities were awarded a total of £7.8 million to fund pilot projects in rural areas for a period of two years. The projects were all quite different, ranging from exploring opportunities for greater integration, developing new types of service, and the development of IT systems and web portals. A common objective was to develop partnership working with health, as the DfT had highlighted this as one of its objectives in the bidding guidance.

SECTION 8 Possible future models

Devon achieved joint working with its Clinical Commissioning Group and established a single point for all health transport referrals and requests. Oxfordshire and West Berkshire were able to use their in-house fleets to support South Central Ambulance Service in enhancing patient transport services. However, some other authorities struggled to engage with NHS partners, although one or two have made progress since the end of the pilots.

Cambridgeshire looked to take a more holistic approach to the provision of services in one part of the county. Consulting with users and other parties, it reviewed all transport in the area, including market day bus services, dial-a-ride and adult social care transport. A new DRT service, called East Cambridgeshire Connect, was introduced in April 2017 to meet all these requirements in an integrated way. Whilst successful in opening up new travel opportunities, such as for medical appointments, work and education, and enjoying greater usage than the individual services it replaced, the service is costing more, essentially due to the costs of the call centre and booking and scheduling software system. Despite having to pay half fare (£2 per journey), many concession holders are using the service, suggesting that they value the service and are able to make trips that they wouldn't otherwise be able to make for free on conventional bus services.

A joint project involving Essex and Suffolk researched the needs of rural communities and concluded that flexible transport solutions would play an important part of future transport provision. It envisaged the need for a digital booking platform operated by the local authority that would enable residents to easily book local demand responsive services. Suppliers and passengers would register to use the platform, which would create a standardised booking experience for passengers across the various suppliers. It is envisaged that the system would accommodate different types of suppliers and services, including taxis, community transport and commercial bus. They would agree to terms set out by the authority, as broker, including price structures and concessionary fares arrangements.

Other authorities (e.g. North East Lincolnshire and Warwickshire) looked to work collaboratively with their community transport operators to develop joint approaches to the recruitment, retention and training of volunteers, or to provide single contact points that would signpost to individual schemes.

Northamptonshire County Council, the recipient of the largest Total Transport grant of £750k, sought to develop a new approach to integration through the establishment of a social enterprise, Societal. Launched with two founding partners, the County Council and University of Northampton, Societal sought to gather data on travel patterns and demands in order to consider how use of this could guide more integrated approaches to transport solutions and ultimately achieve efficiencies for the participating organisations. Its business model aimed to attract interest from other organisations, using data to replan networks and services more efficiently and to receive a proportion of the savings to sustain itself. Based on its early analysis, it estimated that significant savings could be achieved. However, by the end of the Total Transport pilot period it had not realised any savings.

Lessons from the Total Transport projects can be summarised as follows:

- Local knowledge is vital to be able to develop and design appropriate integrated services
- Good partnership relationships are necessary to ensure trust and confidence and promote information sharing
- There is no easy one size fits all solution - solutions need to be tailored to local circumstances and the types and the nature of existing operators and services
- Efficiencies and savings are achievable through integrated approaches, or the provision of more service for the same money
- Flexible types of transport provision are pushing the boundaries of the current legal framework, as distinctions between taxis, private hire vehicles, MPVs and minibuses and their use becomes blurred
- The pilot funding provided the necessary resource and opportunity to think differently and question things, together with a push towards further integration of services.

In terms of the Total Transport ambition, this may have been constrained by the duration of the projects, which by the time they had mobilised had less than two years to deliver their objectives. Equally, it could be argued that the timing of the initiative was not ideal, given the significant pressures upon local authorities at the time. A key issue for many authorities was the inability to engage with the health sector. Reasons for this include the inability to find a contact responsible for transport, reluctance to consider change from current models of NEPT provision, and differences in language, understanding and scale (as many NEPT contracts are part of collaborative agreements that cover much larger areas than a single local authority). Furthermore, whilst the health sector spends large sums on transport, these are insignificant in comparison with the huge budgets for healthcare services. Therefore, little attention is given to transport and there seems little incentive to try and make savings.

As NEPT is commissioned by a variety of NHS bodies and provided by different types of providers, there are inconsistencies in the way it operates. Equally, differences in licensing arrangements across commercial, public and voluntary sector providers limit the ability for operators to collaborate, the categories of passengers they can convey and whether they can charge. This further restricts the ability to work in an integrated way.

Arriva Transport Solutions Ltd (ATSL), which provides NEPT services, was involved in a number of Total Transport pilots. However, their view was that as far as NEPT was concerned, little traction had been achieved in terms of moving towards new types of provision. This would only happen if we can reach a point of joint commissioning services and all demands for different types of transport need are on a single platform, rather than being dealt with separately. The best prospect of moving forward would be in an area where both the local authority and clinical commissioning group want a new approach.⁸¹

Much NEPT provision is in rural areas, but spare seats cannot be made available to fare paying passengers. Furthermore, there are people from similar areas being transported to hospital in different ways; those eligible for assistance by NEPT, whilst those ineligible or who choose not to use NEPT, may travel to an appointment using a volunteer car scheme.

Whilst the health transport market is getting more complex, about half of current NEPT users do not require specialist transport. Demands are increasing and so the current model of provision seems unsustainable. This is demonstrated by some of the stories by service users highlighted in Age UK's *Painful journeys* publication.⁸²

In a report⁸³ considering innovations in health transport, the CTA made several recommendations that would help to develop more effective NEPT:

- Create a culture of innovation in NEPT delivery, with more research, understanding and consideration of options and service design
- Commissioning through contracts that support innovation in transport provision, offering flexibility and opportunities for collaboration with community transport that is providing for social need
- Patient involvement in co-creating their own travel solutions, so that transport is patient centred
- Collaborative approach to NEPT which draws on the contributions of a broader range of stakeholders, including working with other transport providers
- Involvement of community transport as a means of adding distinct value to the patient experience
- Collect and share better and more meaningful data to improve service design and improvement, including real time information and integration of booking transport at the same time as appointments are made.

In 2014, Campaign for Better Transport⁸⁴ proposed more devolution of transport responsibilities outside of the city regions to transport consortium, similar to practice in Germany. It was considered that these would provide a more local focus, allow pooling of resources and provide opportunities for a Total Transport approach. This theme was picked up by the Institute for Public Policy Research (IPPR) in 2015, which promoted the idea of establishing Total Transport Authorities, as a way of better of providing rural bus services.⁸⁵ These authorities would cover travel to work areas spanning multiple local authority geographies. They would take charge of all transport-related funding and regulatory powers, to encourage a broad range of providers, and pool capacity and expertise to develop the best ways of providing effective transport services. Firstly, they would pool responsibility of public, school and social care transport, then, secondly, draw in health and further/higher education transport.

The IPPR called for new thinking and innovation, with coordination and pooling of funding together with the building of momentum towards franchising, alternative business models such as social enterprise or municipal operation, partnerships and use of technology. It considered that some of these principles were already contained with the Total Transport pilot projects funded by DfT in 2015.

It built its recommendations on four main concepts:

- Buses are critical to social justice and air quality
- Decisions about regulation need to be devolved to a local level
- Integration of public funding
- Innovation.

Recommendations made by the IPPR were as follows:

- Establish Total Transport authorities as new strategic bodies and align the transport strategy with wider social, economic and environmental strategies
- Pool all funding for passenger transport provision, including capital, BSOG and concessionary travel reimbursement
- Take a whole network approach to franchising that rewards effective operation and service development and innovation, as in Jersey. It also drew on such approaches in the Netherlands
- Total Transport authorities should enable and encourage innovation.

Lower public transport fares

There are varying views about how above inflation rises in bus fares have contributed to the decline in bus usage. Certainly, bus travel has become relatively costlier for fare payers compared to the falling real costs in car use. Some commentators have suggested that bus operators have increased fares to help cover reductions in concessionary travel reimbursement.

Whilst in urban areas, operators provide attractive ticketing options and season tickets for regular users, these are not necessarily offered in rural areas. Furthermore, initiatives such as PlusBus only cover bus travel for rail passengers within the urban area around a station and do not extend to rural hinterlands.

Cities, such as Bristol, where commercial decisions have been taken to reduce ticket prices have seen significant increases in usage by fare paying passengers.

Some local authorities offer discounted fares schemes for certain groups, such as young people, with the Staffordshire Your Card. In Wales, Welsh Government continues to fund free travel at weekends on TrawsCymru services, which has boosted usage by 58 per cent on those days.⁸⁶

There have been recent calls to look at whether bus services should be cheaper or free, as across the world some cities have introduced free bus travel. However, such policy moves are primarily seen to address urban problems of air quality and congestion, rather than improving accessibility in rural areas. The potential benefits in rural areas are limited, as available services are so depleted. Therefore, significantly more resource would be needed to create reasonable levels of service in rural areas on which to offer free or low cost travel.⁸⁷

Such a move has the potential to create usage levels to help underpin usage. However, whether this would be sufficient to give adequate critical mass remains questionable, given the diversity of demands to different destinations.

It has been suggested that free public transport could not be provided within the current deregulated environment. It would only be possible in a situation where local authorities have control over services and plan them in a way that best meets the needs of communities, such as with a franchised network or operated by a municipal bus company.⁸⁸



Localised transport schemes and community involvement

In considering the future transport for older people, Age UK and ILC-UK⁸⁹ called for more powers for transport to be devolved to allow more flexibility in the way rural transport needs are addressed. It supported the pooling of resources (Total Transport approach). It also put forward community-based solutions that made the use of available private transport:

- Community car sharing scheme where older people who no longer feel confident driving could donate their car to a younger person. This would entitle them to travel vouchers for lifts in donated cars. This could benefit older and younger people
- Lift sharing builds on the concept of volunteer car schemes and informal lift-giving among neighbours. Online lift sharing platforms and mobile phone apps have the potential to open schemes to a greater number of volunteer drivers and to make it easier to see what lifts are available.

Community rail partnerships have been successful in getting local communities and interested parties involved in the promotion and support of their local rail service. It has been suggested that this model could be applied to rural bus services, to build interest and usage to help sustain and develop them.

In a study for ATCO,⁹⁰ the idea of community bus service partnerships was explored further, considering experience of different initiatives. It identified four different models:

- **Bus operator working with communities to provide services.** One example was the Isle of Wight Community Bus Partnership, bringing together bus operator Southern Vectis, Isle of Wight Council and local communities. The bus operator made available to communities, buses used on school transport services in their downtime. Volunteers were recruited by the Partnership and trained by the operator, in order that local bus services could be operated that filled gaps in the main network. The local services provided with volunteers were promoted alongside the main network. Some attracted little use and were withdrawn in 2015, but three services were maintained. Very occasionally when a volunteer isn't available, Southern Vectis provide a driver. Furthermore, volunteers with PCV licences are used on a casual basis to drive buses for the bus operator to help maintain one of the main bus routes.
- **Community groups organising and procuring services.** Examples here include the Dales and Bowland CIC Ltd, a community interest company established by the Yorkshire Dales Society to procure and manage bus services primarily for recreational use by ramblers and summer visitors on Sundays and Public Holidays. Funding is sourced from a host of local stakeholders. Services are procured through tendering and are planned to integrate with commercial bus and rail services. Over the years, patronage has grown and in 2015/16 the subsidy per passenger reduced to £1.85, a figure lower than for many supported rural local bus services. The subsidy is outweighed several times by the average amount spent by visitors in the Dales. Strong volunteer support is seen as an important factor. The CIC directors are all volunteers and the Friends of Dalesbus actively distribute leaflets, lead walks for those using the services and provide feedback on performance. Several action groups, made up of residents, local businesses and service users also support the services and lobby for continued recognition of the services.

A further example of this is the Dales Integrated Transport Alliance (DITA), a voluntary stakeholder forum and mutual support body set up by communities in 2011 in response to cuts in local authority financial support for local bus services. Community activity was based on several hubs, based in pre-existing offices or libraries. A number of community transport operations have been established by five of the hubs (e.g. Little White Bus and Western Dales Bus), providing minibus and volunteer car services. The hubs are vital in finding volunteers to run community transport services. DITA has played an important role in raising the profile of issues about inadequate rural transport services, establishing relationships between organisations, and in bringing hub managers together to share best practice, concerns and solutions.⁹¹

- **Local authority promoted Community Bus Partnerships (CBP).** Four supported rural bus services in Leicestershire were under threat of having their funding withdrawn in 2015. To see whether community support might help save the services, the County Council created four separate partnerships and provided a support worker to assist in running the partnerships, in an approach based on the principle of community rail partnerships. Each partnership (made up of service users, community representatives and the operator) also received a small amount of funding (£1,000 pa for three years) to promote the services. As part of the service contracts, operators were required to use a small pool of drivers and to attend CBP meetings and public events.

In evaluating the CBPs, the County Council concluded that they added no added value to the usual provision of supported local bus services. Attendance at partnership meetings had dwindled, apart from one of the services. The support officer concluded that this was a result of apathy within the groups and the assumption that the services would cease anyway at the end of the trial period. Some community members had grown frustrated that there was no answer to the question, 'how much patronage increase is needed to keep the bus safe?' As such, there was nothing concrete to aim for.

The four services concerned had varying levels of patronage and subsidy, ranging from the 113 Melton Mowbray to Oakham (subsidy of £15.54 per passenger) to the best performing, 129 Ashby - Loughborough, where subsidy dropped from £2.59 to £2 per passenger.

It was felt that such partnerships were very different to community rail partnerships, where the physical presence of the track and station provide a focus. For the bus partnerships, the only volunteering opportunity was to attend meetings, which was not sufficient to generate feelings of ownership and group activity, whereas rail offered much more.⁹² This said, there are examples around the country where local authorities have appointed volunteer Parish Transport representatives or champions that enable two-way feedback on bus services, discussion on service changes and may assist in keeping information displays up to date. There are also examples where local bus user groups have been engaged in liaising with local authority officers on service changes and developments.

The Leicestershire example highlights the difficulties of getting people involved and interested in the development and promotion of bus service, whereby there is a relatively small interest group to draw from. This example shows how the trial of a CBP merely put off the day when the service would be withdrawn, perhaps rather than spending the time to develop new solutions to replace the service.

Experience elsewhere has shown the difficulty in expecting communities to come up with their own solutions. A few years ago in Darlington, users and interest groups were invited by the council to come up with solutions for their areas, following an announcement that subsidy for supported services would be withdrawn. Whilst there was plenty of interest from current users (driven by concern that they would be left without a service), who were mainly older people, they couldn't contemplate alternatives and wondered why they couldn't just have a bus service as currently operated. This highlights that if communities are to be expected to develop their own solutions, local authorities need to be able to offer some professional support.

- **Representative bodies.** This is where groups are formed to help promote and develop bus services across an area. An example is the Rural East Lothian Bus Users (RELBUS), which seeks to represent bus users' views to bus operators, encourage service improvements and promote greater integration. Members also monitor bus services.

A further example of this is Bus Users Shropshire, formed in 2011 in response to cuts to bus services. It produces maps promoting the entire public transport network across Shropshire. Furthermore, it has been working with Arriva and Shropshire Council to develop ways of promoting particular bus services. A campaign is being trialled to encourage use of service 576 between Shrewsbury and Oswestry, highlighting things to do and the potential to access walks.⁹³

The ATCO research concluded that there was a role for community involvement in the provision of bus services. Success factors were:

- The involvement of passionate, committed volunteers
- May require paid coordinator
- Clear aims, objectives and purpose for the involvement
- Flexibility of approach to fit local circumstances
- Good partnership working
- High profile for what is being done and visible outcomes delivered
- Relevant to those who should be interested
- Ability to seek funding from various sources.

Mobility as a Service (MaaS)

Mobility as a Service is a concept that blurs the distinctions between different modes and types of provision. It represents a move away from privately owned modes of transport towards consumption of transportation as a service, taking advantage of changes in mindset, such as moves away from car ownership and use amongst young people (particularly in urban areas) and greater acceptance of the sharing economy (as illustrated by the development of Airbnb). MaaS involves blending public and private transport provision across multiple modes with a single interface app for managing trips. The start of this change has already been seen in cities with car clubs, shared bikes, on-demand public transport and autonomous shuttle buses, as well as the availability of good public transport networks with smart payment. Central to the development of MaaS will be the availability of passenger data by which demand and usage can be identified.⁹⁴

Data is at the heart of MaaS. Information about consumers and travellers and their journeys, together with real time understanding of vehicle movements and travel patterns, allows organisations to optimise how they plan, invest in and operate transport networks, blending various types of provision to provide choices to users regarding fastest or most economical means of getting from A to B.

Key points:

- Rural public transport needs to be centrally planned and integrated
- Taxis and community transport have roles to play in rural public transport provision
- Rural hubs will be important to facilitate interchange onto the main bus or rail network
- Total Transport approach will be the way to integrate funding, planning and provision, forming the foundation for rural public transport
- Strong partnerships between interested parties will be vital
- Licensing reform will help in the use of small vehicles in the provision of public transport services
- Good planning and sufficient time needs to be allowed to introduce new models and practices
- Non-emergency patient transport needs to be reformed, with joint commissioning with local authorities and innovative procurement
- Lower fares will not necessarily lead to greater use of rural public transport, unless accompanied by significant expansion of available services
- Community involvement and localised transport schemes are important
- Mobility as a Service offers opportunities to consider and offer a range of different transport services in a holistic, integrated way.

9. Findings and the way forward

Rural bus services have been in decline for many years. Although usage had a boost from the introduction of free concessionary travel for older and disabled people, the overall trend is downward. Whilst reductions in support have accentuated the demise of bus services, it is likely that this would have come about anyway at some point in the future as usage dwindled further. Many people have abandoned buses, as services are unattractive due to circuitous routes and infrequent timetables coupled with the lack of early morning and evening provision.

The car is dominant in rural areas and is seen as the only option even for households that can't really afford to own a car, or certainly a second car. Therefore, buses are used by a small proportion of rural dwellers – those who have no other option (older and younger people) and those, who because they have free travel, choose to use it. However, those people value bus services very much.

The problems of rural bus services have been recognised for many years. The sparse population and limited demand make it difficult to provide and sustain, particularly using conventional fixed route bus services. However, this has been the model that has worked as a reasonable compromise, with the ability to be propped up through financial support and coordination with school transport requirements. Furthermore, existing users have tended to show a preference for fixed route services, even if they are quite infrequent. However, again, this is not to say that is not the best solution. And, as most current users are older people, public consultations show a desire to prioritise Monday – Friday daytime services for shopping, personal business and access to medical appointments, rather than services that will provide access to employment or leisure purposes. The danger of looking to meet current needs is that we perpetuate the sort of provision that is irrelevant to the needs of people in the future.

Dealing with rural public transport decline has been viewed as too difficult to grasp. Therefore, the past approach has been to come up with initiatives aimed at patching things up, rather than taking a step back and considering what a totally new model might look like. Furthermore, rural transport is overshadowed by the attention given to urban and longer distance travel and the large amounts of investment made in those.

Government and local authorities have tended not to consider rural transport strategically, but to consider support for small scale local initiatives, individual bus services or community transport projects in isolation and often on the basis of specific proposals and bids for funding.

Rural bus services are often viewed quite separately. This is because urban and inter-urban networks are largely run commercially by operators, who have generally lost interest in rural areas where services are not viable. Rural services, however, are generally supported by local authorities, which arrange these services quite separately from the commercial network. Consequently, there can be some rough edges between the two networks, particularly where the commercial operator has cherry picked some better performing bits of an otherwise supported network.

Over the years, there have been many initiatives aimed at addressing the transport problems of rural areas. There has been funding for new services and for different organisations to develop solutions. However, these have often been small scale and piecemeal, with short-term funding and with little likelihood of becoming sustainable). They have not necessarily been part of a wider, structured strategy, so any benefits may have been limited. As such, these have failed to arrest the decline of rural public transport. That's not to say that some of those initiatives have not been very successful in setting up and providing some services that have become well established and provide very useful services for users. For example, there are various section 22 community minibuses schemes that were set up with funding available 25 years ago that are still going strong in their rural communities now.

The various approaches and schemes that have been, or may be, pursued fall into three categories: fixed route bus services; DRT; or the provision of private transport to individuals (e.g. moped loan or wheels to work schemes). Researchers have concluded that none of these will solve all the problems of rural transport, but each potentially has a role to play. Regardless, subsidy will be required and solutions will need to be tailored to local circumstances.⁹⁵ It will be vital that political leaders and policy makers recognise this ongoing need for subsidy and that levels of funding are consistently maintained, ensuring that all sources of funding are coordinated and used in the most effective way.

Overall, there has been a hope that things might work out for rural bus services. Even now, there are those who suggest that when driverless buses come along, conventional fixed route services will be able to continue because of the cost savings of having no driver costs. This hope will only serve to distract from the need to take necessary action now.

Rural bus services have been allowed to gradually wither. Passengers have been lost to other modes and they won't easily be won back. Decisive action is needed, before there is further erosion of the base demand that will be needed to support and use any new type of service in the future. Such action should have been taken before now. However, a considered approach is needed to get the right solution, not a knee-jerk reaction that might create uncertainty and deter usage further. Indeed, it would be beneficial to invest in new alternative provision before withdrawing the existing. Overall, there needs to be a more radical and comprehensive approach; it needs to be bold but practical and affordable, offering stability and opportunities to achieve economies of scale.

There will be an ongoing need for some sort of rural public transport provision. Rural areas will tend to have older populations and there will be other groups that have limited or no access to private transport. There will also be those requiring specialist transport. Currently, even in areas with little or no conventional bus services, there are needs being met by various other types of transport, including non-emergency patient transport, volunteer car schemes and transport for school pupils and social care users. There are significant amounts of money involved in providing these services, although they only benefit certain users.

Rural areas can't be abandoned and left to their own devices, as it is the most vulnerable individuals in those communities that will suffer and there will be risks of having to deal with other problems, such as the impacts of social isolation on people's health and wellbeing. There will continue to be travel needs to be met, particularly amongst older and younger people without access to a car. However, in meeting these needs, it will be important to take a holistic view, rather than the fragmented approach adopted of the last 30 years. A consistent and long-term response is needed, taking account of current needs, but also with a view to the future, to avoid catering only for a declining market. Rural public transport needs to be properly planned; it can't be left to the vagaries of the market whereby rural communities are only served by chance.

As a precursor to change, it will be important for good rural transport to be seen as a necessity by decision makers and politicians at all levels, such that its wider social, economic and environmental value is recognised. This will provide the necessary support for regulatory and organisational change, as well as securing on-going funding. A starting point for policy could be that all rural areas should have a public transport service that provides access to employment, education, shopping and recreation, such as is the case in other European countries, perhaps operating six days per week between 0600 and 2300 and seven days where important tourist destinations are served.

The need for local and central government to recognise the importance of bus services is a key recommendation of the latest *Buses in Crisis* report by Campaign for Better Transport.⁹⁶ It suggests that such support would need to be accompanied by greater funding for bus services. At a national level, it recommends that Government establish a strategy for buses (in the same way as other modes have such strategies), with a National Investment Strategy for Buses and Coaches offering long-term funding. This strategy would provide a suitable framework through which to introduce other more specific, smarter funding streams. In terms of models of provision, it encourages taking Total Transport principles further and for local authorities to make full use of the Bus Services Act 2017 powers to focus improvements in service.

Rural areas cannot be viewed in isolation, as many of the travel needs in these areas are to destinations in urban areas. However, the way transport services are provided in each type of area may be best delivered differently, if that avoids getting into wider debates over the best models for bus provision in urban areas. Addressing the needs of rural areas can't wait for the outcome of decisions around franchising in urban and mayoral areas to be resolved. It may be necessary to press forward with something different in rural areas where it is possible to develop something that has lower risks and can be achieved on a voluntary partnership basis because there is minimal commercial interest and therefore less at stake for private operators.

It will be important to take a network approach across rural areas, incorporating smaller towns but excluding large cities and conurbations. These areas will generally be where the majority of current public transport is fully or partially supported, but could also include inter-urban services that pass through the area. Local authorities would lead a planned approach to the design of an integrated network of services for the area, incorporating all types of passenger transport requirements (i.e. Total Transport principles). This network should not be constrained by what is currently provided in the area, but should be designed in a way that builds on what is there, such as existing community transport provision. These designated 'Total Transport Areas' would be treated in a similar way to the Tendered Network Zones put forward by ATCO some years ago.

An effective network is unlikely to emerge if left to multiple agencies with different funding streams. A centrally planned approach is required to achieve a coordinated network. Local authorities would be best placed to achieve this, as they already have transport responsibilities and spend large amounts of public money on education and social care transport. It would be beneficial if the budget and responsibility for organising NEPT in the area was given to the local authority, enabling that to be integrated too and adding to the demand for a flexible responsive transport service.

Total Transport Areas will need to be sufficiently large to cover travel to work areas and hospital catchments. As well as allowing transport services to be planned in a way that is relevant to wider interests, it will provide opportunities for economies of scale in terms of the planning and delivery of services. Therefore, it may be necessary for partnerships of a number of local authorities to be formed (as a combined transport authority). The transport authority will not only need to provide leadership, it will need to develop good partnership working with other interested parties, such as hospital trusts who rely on people reaching their facilities. Such destinations should play a part in planning their services to dovetail with transport and providing information about the travel options. Equally, visitor attractions in the countryside could promote public transport options for reaching them.

Inter-urban bus services, together with any local rail services, would form the framework for the rest of the network. If these bus services were supported, then they would become part of a franchised network planned and controlled by the combined transport authority. If the services were operated commercially, they could remain in the control of the operator, if it agreed to meet various conditions, including cooperation with feeder services, integrated ticketing and assurances on maintenance of services in the long term. Such an agreement could be encompassed within an enhanced partnership under the Transport Services Act 2017. If the operator was not prepared to meet these requirements, the local authority would be able to apply to take over the service and include it within its tendered network (as part of the franchising element of the Act).

All transport funding would be pooled for services in the Total Transport Area, including BSOG (but not for commercial inter-urban services). Most funding or potential funding sources are linked to urban settings, such as parking revenues, local payroll tax, land value benefit, workplace parking levy, congestion charge. It would be useful to find a mechanism to spread the benefits of some of these, particularly as cities will benefit from rural dwellers participating in urban activities.

The network would be developed in partnership with operators and would include a mix of fixed route and flexible services. Fixed routes would only be provided where there is a recognised bulk demand, otherwise comprehensive DRT would be specified. Packages of service contracts would be put out to tender. There would be common branding and promotion of services and integrated ticketing. Vehicles would be multi purpose and be used to convey all types of passengers. Operators could include commercial bus, taxi, on-demand providers, community transport or local authority in-house.

Services would be constantly reviewed. So, where regular patterns of provision emerge on demand responsive services, fixed route services might be introduced.

For consistency in quality and operational convenience it would be useful if taxi and PHV legislation was amended and licensing dealt with at the combined transport authority level. As part of the licensing regime, operators would be encouraged to see themselves as public transport providers.

The idea would be to plan the network in the most efficient way, with local fixed or flexible transport feeding into the main fixed public transport services at hubs, with all services running to clock-face timetables. In addition, all specialist transport would be integrated and all demands and referrals for transport made through a single point that would plan and schedule flexible services. Integrated ticketing would apply across all services, with smartcard technology and real time tracking of all vehicles. Free concessionary travel could remain on all conventional bus services, as this would help to encourage usage and modal transfer from car. It is suggested that all flexible services would involve a charge for everyone, although this would be discounted for concession holders and could be free for users for whom another agency is responsible for their transport (such as those eligible for NEPT).

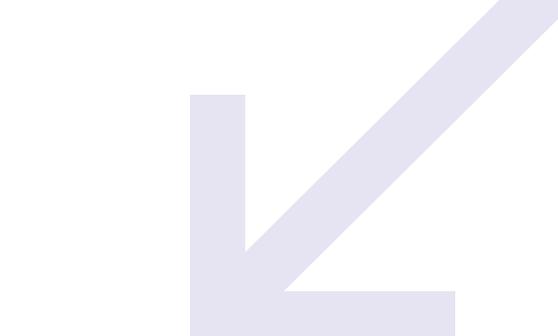
Whilst the starting point might be based around current services, the aim would be to ensure that consistent and comprehensive provision was in place. This wouldn't necessarily be based around existing community transport operating areas or conditions. Furthermore, booking arrangements and scheduling would be centralised. As such, there may be some consolidation of community transport organisations, again to achieve economies of scale. All types of provision would become integrated, including car clubs, volunteer car services and car sharing schemes, as these may all contribute to the wider whole. For instance, a car club vehicle might be used by someone without their own car, to provide transport as part of a volunteer car scheme. Equally, the car club vehicle might provide a local vehicle to provide a school transport service, rather than contracting with a taxi company that may have significant dead mileage.

It will be vital to plan the network in conjunction with local communities, recognising that they have local knowledge and insight, will highlight needs and demands and will also be able to be part of the solution, by being involved in community-based initiatives. New initiatives would be encouraged and supported, such as the crowdsourcing of services to test out new potential routes. Also, initiatives to use available capacity, such as the ability to sign up to receive messages about travel opportunities. For example, a volunteer car service might post a message through the coordination centre: 'Anyone want to go to X today at 1000, returning at 1500, two seats available, cost £4 per person.'

Key principles for the future development of rural transport

The following key principles are considered important to underpin and provide a suitable framework for the support and development of rural public transport:

- Recognise that there will be a continuing need for rural public transport and that it will require financial support. Therefore, policies should recognise this, backed by ongoing funding to fund services. Capital funding, in addition to revenue funding, will help ensure infrastructure is provided to support service enhancement
- Take a holistic view of urban and rural public transport networks, recognising the linkage between the two. Exert some form of considered, central planning over rural networks to ensure they develop in an integrated and efficient way. A sense of 'network' needs to be achieved
- Collaboration by all interested parties (policy makers, commissioners and providers) is vital to achieve integration, economies of scale and effective use of resources. This will form the basis of a Total Transport approach. Using the powers of the Bus Services Act 2017 may help
- It will be important to involve rural communities throughout, both to articulate needs and to assist in the formulation and implementation of solutions
- A range of different operators and types of service (mixed economy of provision) will be necessary to find the most effective solutions for different areas. These may include private bus, taxi and private hire vehicle, community transport, public sector in-house vehicles, car clubs and car share schemes, all promoted across a single mobility as a service platform
- Taxi licensing reform may assist in service developments, and community transport operators may benefit from some consolidation of certain functions
- Inter-urban bus services will form the framework for local networks, with more sparsely populated areas served by demand responsive services, feeding into the main network
- Operators need to be incentivised to develop and improve services, rather than merely operate services in a passive way as specified by commissioners. Again, partnership approaches should help, together with the use of more flexible procurement methods that look to achieve desired outcomes (as opposed to focusing on inputs and outputs)
- The value placed on certain services by users needs to be recognised, with fares set to reflect this and in a way that will help sustain services in the future
- The organisation of NEPT needs to be reviewed and reformed in order that it can be planned and provided in an integrated way with other types of transport.



Recommendations

Central government:

- Recognise the importance of rural public transport and require all areas to be served by transport that provides access to employment, education, shopping and recreation. Place a duty on local authorities to ensure their areas have suitable public transport to meet national requirements
- Provide ringfenced funding dedicated to rural transport services
- Support the principle of designated Total Transport Areas, serviced by Combined Transport Authorities
- Require rail franchises to take account of local integrated transport arrangements in Total Transport Areas and to require the rail operator to participate in integrated timetabling, ticketing and information
- Transfer responsibility and funding for NEPT from the NHS to Combined Transport Authorities, taking the opportunity to reform its principles in respect of who it serves and how it operates
- Under the terms of the Bus Services Act 2017, enable individual commercial bus services to be included within a franchised network where operators fail to agree the voluntary inclusion of the service within an agreement with the combined transport authority
- Look to reform taxi and private hire vehicle licensing, to enable such vehicles to more easily play a greater role in public transport provision.

Local government:

- Recognise the importance of rural public transport and the need to take action to ensure future provision
- Form partnerships with neighbouring authorities to form a Combined Transport Authority, responsible for all passenger transport provision within a designated Total Transport Area
- Centrally plan, design and implement an integrated and comprehensive passenger transport network. Use innovative procurement techniques to incentivise service development and integration
- Work in partnership with other interested parties, such as Hospital Trusts, to understand needs and provide more effective solutions
- Engage with communities to understand local needs and to help in the planning, design and provision of services
- Proactively support a mixed economy of transport provision, to ensure suitable solutions are available for local needs and circumstances.

Communities:

- Should take more responsibility for identifying and collating details of local transport needs and in developing solutions with Combined Transport Authorities.

Operators:

- Act more as partners with Combined Transport Authorities, rather than merely as providers of services, taking an active role in the development of provision
- Collaborate with one another to achieve joined-up solutions and economies of scale.

Annex

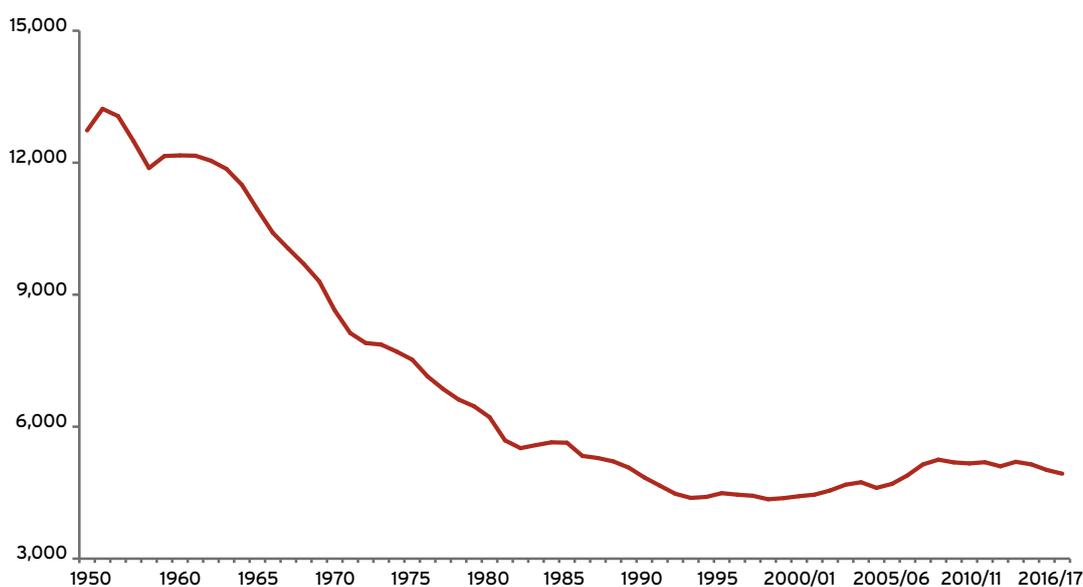
Bus use across Great Britain has been declining since the 1950s. In 2016/17 a total of 4,931 million passengers were carried by bus, representing just 38 per cent of the journeys made in 1950. Figure 1 below shows how there was a gradual fall in journeys through the 1970s and 1980s, with numbers stabilising during the 1990s and an increase in the 2000s, mainly attributed to growth in London with the Congestion Charge and improvements in bus services. However, journeys fell back again in 2016/17.

Between 1982 and 2016/17 passenger journeys on local bus services in England outside London fell by 38 per cent. During the same period, passenger journeys in Wales and Scotland fell by 45 per cent and 43 per cent respectively.⁹⁷

Declining bus use mirrored the decline in the provision of bus services. In 1960, there were 1,975 million vehicle miles operated on local bus services. By 1985/86 this had fallen to 1,290 million. However, following bus deregulation in 1986, vehicle mileage increased, peaking at 1,659 million in 1999/2000. It has since declined again, standing at 1,503 million.⁹⁸ The fact that bus mileage has held up more than patronage suggests smaller loadings on each bus.

Different areas saw different variations in vehicle miles. The English non-metropolitan areas and Scotland have vehicle mileages that are greater than they were in the 1980s. Some areas have seen the introduction of higher frequency services than existed in the past, to be attractive to users as an alternative to the car. Some rural areas have also benefitted from more frequent and regular services than they had many years ago. In particular, there has been the development of new inter-urban services.

Figure 1: Passenger journeys on local bus services in Great Britain



Source: Department for Transport Bus Statistics Table BUS0101

Non-metropolitan areas saw significant growth in supported mileage up until 2008/09, due partly to stepping in to replace commercial services being withdrawn and partly to the expansion of rural bus services with new sources of funding (Rural Bus Subsidy Grant, Rural Bus Challenge and Urban Bus Challenge). However, following the pressures on local government funding, there was a significant decline in supported mileage after 2008/09 from 189 million miles to 90 million in 2016/17.

Between 2011/12 and 2016/17, overall rural bus mileage fell by 6.2 per cent. Within this change, commercial mileage increased by 9.4 per cent, as operators maintained some previously supported services. Meanwhile, supported mileage declined by 44.8 per cent.

There is significant variation in levels of bus usage between different local authority areas. Urban areas enjoy higher levels of usage, due to lower car ownership and the greater availability of public transport services. Therefore, when the numbers of journeys by bus are averaged out across the whole population of an area, more rural areas have very low levels of usage due to a combination of fewer journeys being made by bus users and the much smaller proportion of the population using buses. In 2016/17 across England as a whole, there was an average of 80.3 passenger journeys per head of population.⁹⁹ Urban areas, such as Brighton & Hove and Nottingham saw high usage of 171.8 and 149.4 respectively. Rural authorities saw much lower levels of average bus use per head: North Yorkshire 22.4, Lincolnshire 18.4 and Herefordshire 13.4.

Whilst rates of bus usage vary significantly between local authority area, so has the change in usage over time. Between 2009/10 and 2016/17, during which there have been cuts in financial support for local bus services, it is the more rural authorities that have generally seen greater falls in average usage (North Yorkshire -20.6 per cent; Herefordshire -19.4 per cent; Lincolnshire -16.6 per cent).

A study in 2017 for the Confederation of Passenger Transport indicated that Scottish bus patronage had fallen by seven per cent between 2012 and 2016. Key factors were higher car ownership, growth in on-line services, fares increases and congestion, with resultant increases in bus journey times. Furthermore, improvements in the health and wealth of older people meant that more could drive rather than use the bus.⁶ Between 2011/12 and 2015/16, there was a net reduction of 27 million trips by bus in Scotland. Increasing car ownership explained a reduction of 12 million trips, whilst online services and home delivery explained a reduction of 7.3 million trips. The National Travel Survey suggests that people who frequently buy goods online make an average of 25 per cent fewer bus trips per year.¹⁰⁰

Concessionary travel for older and disabled people is an important element of bus use. The number of concessionary passes on issue has risen in recent years, although the total number of journeys made by concession holders has declined. The number of journeys in English non-metropolitan areas fell from 451 million in 2010/11 to 398 million in 2016/17.

The provision of bus services is dependent on their financial viability, which is influenced both by the relative cost of operation and the ability to generate income. Over recent years, operating costs have increased, both in terms of cost per passenger (partly influenced by declining usage) and cost per vehicle mile.

Operating revenue is made up of a number of elements. Whilst overall revenue has held up over the years, the make-up of this has changed. This is illustrated in Table 6 below for English non-metropolitan areas. Since 2004/05, total operating revenue rose until 2009/10 and then fell again, partly due to reductions in local authority support, but also reductions in Bus Service Operator Grant (BSOG) and concessionary fares reimbursement.

Table 6: Operating revenue (£millions) for local bus services in English non-metropolitan areas

Financial year	Passenger fare receipts	Gross Public Transport Support	Concessionary Travel	Bus Service Operators Grant	Total estimated operating revenue
2004/05	1,177 (62.0%)	346 (18.2%)	168 (8.8%)	208 (11.0%)	1,899
2006/07	1,130 (53.4%)	407 (19.2%)	372 (17.5%)	208 (9.8%)	2,116
2009/10	1,202 (49.7%)	448 (18.5%)	535 (22.1%)	233 (9.6%)	2,417
2016/17	1,257 (57.5%)	252 (11.5%)	510 (23.3%)	168 (7.7%)	2,187
% change from 2004/05 to 2016/17	+6.8%	-27.2%	+203.6%	-19.2%	+15.2%

Source: DfT Bus Statistics BUS0501b

Concessionary fares revenue has fallen as a result of declining usage, but also due to tightening of the reimbursement rates. For example, in Scotland, the reimbursement rate was 73.6 per cent in 2006/07, but in 2018/19 is 56.8 per cent.¹⁰¹

Whilst the above figures show the importance of concessionary travel, this shouldn't detract from the fact that fare-paying passengers still provide the most significant contribution to the maintenance of bus services. However, this balance will vary between different types of services; rural services are likely to have higher proportions of concessionary travel holders, for instance.

Taking account of various elements of government support for local bus services, net support per passenger journey in English non-metropolitan areas has risen from 53.4p in 2004/05 to 79.5p in 2010/11, falling back to 65.5p in 2016/17. Looking at the figures for local authorities, support peaked in 2008/09 and 2009/10 and has since declined at varying levels, depending on decisions by local authorities to reduce support for bus services in the light of local government budget pressures. Reductions in support between 2008/09 and 2016/17 range from -2.3 per cent in Essex, to -40 per cent in North Yorkshire and -84 per cent in Cumbria.¹⁰²

Looking at English non-metropolitan areas alone, Table 7 below compares changes in average costs and revenues. Increases in average costs have outstripped average revenue, leading to reduced margins. This will have influenced decisions by operators to withdraw services.

Table 7: Comparison of operating costs and revenues (£ at 2016/17 prices) for bus services in English non-metropolitan areas

	Per passenger journey			Per vehicle mile		
	Cost	Revenue	Surplus	Cost	Revenue	Surplus
2006/07	1.48	1.69	0.21	2.80	3.19	0.39
2016/17	1.57	1.74	0.17	3.16	3.50	0.34
% change	6.1%	5.0%	-19.0%	12.9%	9.7%	-12.8%

Source: DfT Bus Statistics tables BUS0402b, BUS0403b, BUS0407b, BUS0408b

Trends and analysis

Different areas saw different variations in vehicle miles, as illustrated in Table 8. The English non-metropolitan areas and Scotland have vehicle mileages that are greater than they were in the 1980s. Meanwhile, the metropolitan areas have less vehicle miles. These figures reflect the way that bus networks have developed over time. Some areas have seen the introduction of higher frequency services than existed in the past, to be attractive to users as an alternative to the car. Some rural areas have also benefitted from more frequent and regular services than they had many years ago. In particular, there has been the development of new inter-urban services.

Table 8: Vehicle miles (millions) on local bus services

	English metropolitan areas	English non-metropolitan areas	Wales	Scotland
1982	364	539	66	178
1986/87	346	577	58	188
1996/97	430	693	75	229
2006/07	367	663	77	239
2016/17	309	624	62	203

Source: DfT Bus Statistics BUS0203a

However, it is also important to consider the changes in the different types of vehicle mileage: commercial and that supported by local authorities (see Table 9 opposite and Table 10 on page 64).

Table 9: Vehicle miles on local bus services by metropolitan status and country and service type: Great Britain, annual from 1987/88 (millions).

Commercial, excluding London.

Year	English metropolitan areas excluding London [†]	English non-metropolitan areas	England excluding London [†]	Scotland	Wales	Great Britain excluding London [†]
1987/88	318	524	842	175	50	1,067
1988/89	327	532	859	175	55	1,089
1989/90	340	534	874	180	58	1,112
1990/91	345	534	879	181	61	1,121
1991/92	354	528	882	189	58	1,129
1992/93	363	533	896	187	57	1,140
1993/94	377	541	918	191	61	1,170
1994/95	392	552	944	198	61	1,203
1995/96	373	564	937	183	62	1,182
1996/97	374	577	951	193	59	1,203
1997/98	375	557	932	193	57	1,182
1998/99	373	570	943	185	55	1,183
1999/00	360	592	952	191	58	1,201
2000/01	356	574	930	195	60	1,185
2001/02	349	538	887	190	59	1,136
2002/03	341	523	864	193	55	1,112
2003/04	316	511	827	188	53	1,068
2004/05	305	499	804	187	52	1,043
2004/05 ^R	317	487	804	187	56	1,046
2005/06 ^R	315	488	803	192	55	1,050
2006/07 ^R	314	480	794	191	52	1,037
2007/08 ^R	318	480	798	196	51	1,045
2008/09 ^R	310	480	790	193	52	1,036
2009/10 ^R	295	478	773	188	50	1,011
2010/11 ^R	295	482	776	174	50	1,000
2011/12 ^R	297	489	786	173	51	1,010
2012/13 ^R	294	502	796	163	51	1,011
2013/14 ^R	294	511	805	166	51	1,022
2014/15 ^R	288	524	812	165	48	1,025
2015/16 ^R	283	521	804	171	51	1,025
2016/17	273	535	808	165	49	1,023

[†] Buses in London operate under a different regulatory model to the rest of the country, and comparisons on a service type basis would have little meaning. London figures are therefore excluded from this table.

^R Previously published figures have been revised.

Table 10: Vehicle miles on local bus services by metropolitan status and country and service type: Great Britain, annual from 1987/88 (millions).

Local Authority supported, excluding London.

Year	English metropolitan areas excluding London [†]	English non-metropolitan areas	England excluding London [†]	Scotland	Wales	Great Britain excluding London [†]
1987/88	65	107	172	30	15	217
1988/89	66	106	172	27	18	217
1989/90	66	112	178	29	16	223
1990/91	59	109	168	27	16	211
1991/92	58	116	174	32	16	222
1992/93	59	114	173	29	17	219
1993/94	54	117	171	34	20	225
1994/95	55	118	173	32	17	222
1995/96	58	120	178	34	15	227
1996/97	56	116	172	35	16	223
1997/98	58	116	174	36	16	226
1998/99	52	128	180	37	19	236
1999/00	50	128	178	35	18	231
2000/01	50	130	180	35	18	233
2001/02	53	147	200	39	19	258
2002/03	51	153	204	39	22	265
2003/04	54	153	207	42	17	266
2004/05	53	170	223	35	20	278
2004/05 ^R	51	172	223	37	25	284
2005/06 ^R	51	178	228	41	24	293
2006/07 ^R	53	183	235	48	24	308
2007/08 ^R	53	183	236	51	26	313
2008/09 ^R	56	189	245	46	26	317
2009/10 ^R	58	188	247	46	27	320
2010/11 ^R	58	185	242	42	27	311
2011/12 ^R	53	166	219	37	22	278
2012/13 ^R	50	149	199	40	21	259
2013/14 ^R	45	139	184	41	18	243
2014/15 ^R	42	122	164	39	18	221
2015/16 ^R	39	106	145	34	15	194
2016/17	36	90	125	38	13	176

[†] Buses in London operate under a different regulatory model to the rest of the country, and comparisons on a service type basis would have little meaning. London figures are therefore excluded from this table.

^R Previously published figures have been revised.

Between 1987/88 and 1994/95 commercial mileage increased in all areas, then decreased (except in Scotland where it held up better until 2008/09). Meanwhile, the metropolitan areas have witnessed a general fall in supported mileage from 65 million to 36 million miles, particularly falling away since 2010/11. This may reflect greater commercial interest in operating urban networks.

Between 2011/12 and 2016/17, overall rural bus mileage fell by 6.2 per cent. Within this change, commercial mileage increased by 9.4 per cent, as operators maintained some previously supported services. Meanwhile, supported mileage declined by 44.8 per cent. In 2011/12, 28.7 per cent of total rural bus miles were supported. By 2016/17 this had fallen to 16.9 per cent.¹⁰⁴ The DfT noted that just in the year ended March 2017, overall bus mileage decreased by 1.1 per cent, largely due to a 13.8 per cent decrease in mileage on local authority supported services in England outside of London.¹⁰⁵

Clearly, the different characteristics and nature of bus networks in different areas has an impact on the relative need for support. Urban areas tend to see less than ten per cent of mileage supported; indeed, several urban areas have no budget for bus support. More rural areas see greater proportions of their networks supported, although this support has been declining in many areas. In 2016/17, Surrey had 48 per cent of its bus mileage being supported and Herefordshire 43 per cent. Some rural areas, however, had a much smaller proportion of their network supported, such as Lincolnshire with 15 per cent and Suffolk with 20 per cent.¹⁰⁶

In England, the decline in bus patronage was far more pronounced in metropolitan areas (52 per cent) than in non-metropolitan areas, as highlighted in Table 11.

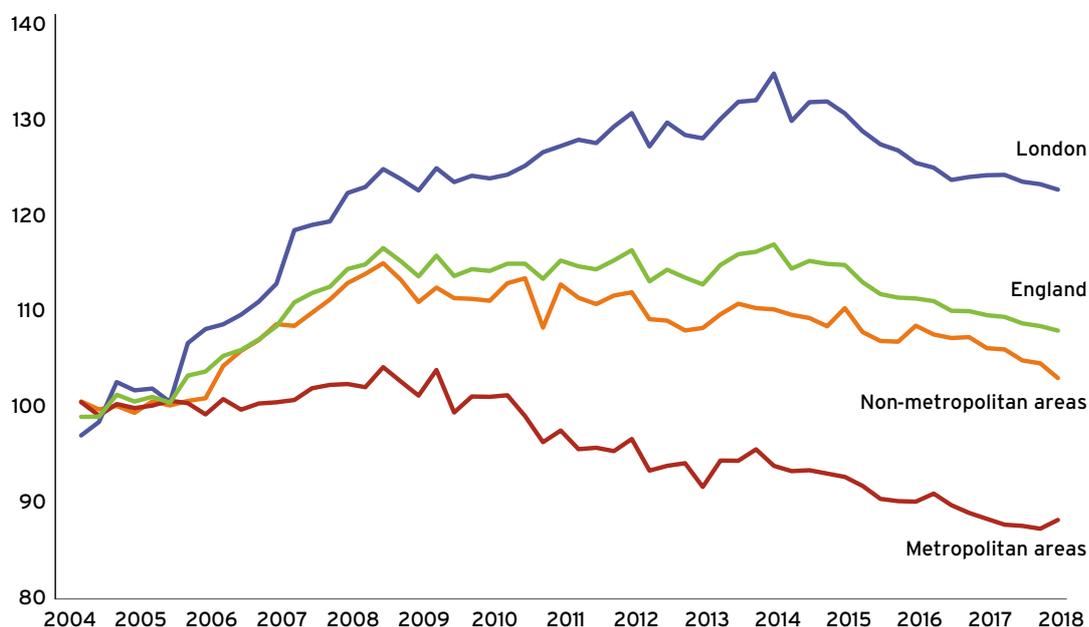
Table 11: Passenger journeys (millions) on local bus services in England

	England outside of London		
	Metropolitan areas	Non-metropolitan areas	England total
1982	1,981	1,615	3,596
1996/97	1,310	1,304	2,614
2006/07	1,052	1,253	2,305
2016/17	938	1,260	2,198
% change between 1982 and 2016/17	-52%	-22%	-38%

Figure 2 below further illustrates the greater decline in passengers in the metropolitan areas. Meanwhile, bus passenger journeys in non-metropolitan areas have remained relatively stable, only seeing steady decline in the last four years towards the level they were at in 2004.

There is significant variation in levels of bus usage between different local authority areas. Urban areas enjoy higher levels of usage, due to lower car ownership and the greater availability of public transport services. Therefore, when the numbers of journeys by bus are averaged out across the whole population of an area, more rural areas have very low levels of usage due to a combination of fewer journeys being made by bus users and the much smaller proportion of the population using buses. In 2016/17 across England as a whole, there was an average of 80.3 passenger journeys per head of population.¹⁰⁷ The conurbations generally had higher levels of average use per head: London 254.9, Tyne and Wear 101.2 and Greater Manchester 72.4. Other urban areas, such as Brighton & Hove and Nottingham also saw high usage of 171.8 and 149.4 respectively. More rural authorities saw much lower levels of average bus use, such as Devon (33.6), Northumberland (27.3) and Suffolk (22.6), although these rates were probably boosted by use within the urban areas in these authorities. Yet other authorities saw even lower levels of average use per head: North Yorkshire (22.4), Lincolnshire (18.4), Herefordshire (13.4) and Cheshire East (11.9).

Figure 2: Passenger journeys on local bus services by metropolitan area status and country: Great Britain, quarterly



Index: 2004/05 = 100, seasonally adjusted
 Source: Department for Transport Bus Statistics BUS0106

Whilst rates of bus usage vary significantly between local authority area, so has the change in usage over time. Looking at the period between 2009/10 and 2016/17, during which there have been cuts in financial support for local bus services, it is the more rural authorities that have generally seen greater falls in average usage (North Yorkshire -20.6 per cent; Herefordshire -19.4 per cent; Cheshire East -18.2 per cent; Lincolnshire -16.6 per cent; Suffolk -6.1 per cent), although Devon saw a rise of 3.6 per cent. The conurbations saw reductions, such as -8.8 per cent in Greater Manchester. However, some urban areas enjoyed significant increased average usage per head, such as Brighton & Hove of +21.5 per cent.¹⁰⁸

Between 2011/12 and 2015/16, bus trips per head in Scotland fell from 82 to 76. The decline in patronage being more pronounced in the non-concessionary segment of the market. Between 2008 and 2015, Scotland saw an average reduction of 0.8 per cent of the population using a bus every day. Greatest reductions were in urban areas such as Glasgow (-four per cent), although some rural areas also saw declines (Dumfries & Galloway -1.2 per cent; Highland -0.8 per cent).¹⁰⁹

Similar reductions in bus journeys have occurred in Wales. Between 1986/87 and 2016/17 a 34.5 per cent decrease has occurred.¹¹⁰ Whilst this masks a slight increase in journeys between 2002 and 2009, the overall trend has been falling. Since 2008/09, passenger journeys have shown a continuing downward trend with large year-on-year falls in 2009/10 (ten per cent), 2012/13 (six per cent) and 2014/15 (six per cent). This trend will partly reflect wider patterns of socio-economic and car ownership change, but is likely to be in part due to reductions in bus services. Between 2012/13 and 2016/17 vehicle kilometres travelled on all local bus services in Wales fell from 115.8 million to 100.3 million, a 13.4 per cent reduction. Whilst kilometres on commercial bus services reduced by 4.5 per cent, subsidised kilometres fell dramatically from 33 million km to 21.1 million km, a 36 per cent drop.

Concessionary travel for older and disabled people is an important element of bus use. The number of concessionary passes on issue has risen in recent years, although the total number of journeys made by concession holders has declined in both metropolitan and non-metropolitan areas. The number of journeys in English non-metropolitan areas fell from 451 million in 2010/11 to 398 million in 2016/17. Average journeys per pass fell from 74 to 62 per year during that period; these represent significantly less use than seen in metropolitan areas where average use fell from 135 to 114.¹¹¹

The proportion of eligible people with a concessionary pass varies significantly between different local authority areas. In 2016/17, urban areas, such as Greater Manchester, Blackpool and Bournemouth, had high take-up rates of over 85 per cent. Meanwhile, more rural areas, such as Lincolnshire, Shropshire and Herefordshire, had rates of 61 to 66 per cent. Furthermore, these represented a decline since the previous year.¹¹²

Despite the decline in use, local bus services remain an important mode of travel for a variety of journey purposes. 24 per cent of overall bus passenger journeys are for commuting and 23 per cent for shopping. Just three per cent of journeys are for business.¹¹³

The provision of bus services is dependent on their financial viability, which is influenced both by the relative cost of operation and the ability to generate income. Over recent years, operating costs have increased, both in terms of cost per passenger (partly influenced by declining usage) and cost per vehicle mile. In English non-metropolitan areas, costs per passenger journey rose from £1.48 in 2006/07 to £1.57 in 2016/17.¹¹⁴ Costs per vehicle mile rose from £2.80 to £3.16.¹¹⁵

Table 12 below shows how operating revenues per passenger journey have generally held up. Peaking in 2012/13, they stood at £1.74 in English non-metropolitan areas and Wales in 2016/17.

In terms of operating revenue per vehicle mile, this has increased over the last ten years in all areas by varying degrees. In 2016/17, metropolitan areas had average revenue of £4 per vehicle mile, compared to £3.50 in non-metropolitan areas.¹¹⁶ The increase in revenues may be partly due to the rise in bus fares. Figure 3 opposite shows how fares have increased at a greater rate than the retail price index, but more so in the English metropolitan areas. The availability of attractively priced season tickets in urban areas help cushion the impact of fares rises on frequent bus users. However, higher fares undoubtedly deter others from using the bus, particularly as motoring costs have reduced in real terms. Of course, many bus users who have concessionary travel passes are shielded from concerns about fares levels. It has been suggested that as reimbursement rates for concessionary travel have reduced, operators may have felt they had little choice but to increase fares for others (also feeding into higher average fares that are one of the variables used in the calculation of reimbursement rates).

Table 12: Operating revenue* per passenger journey (at 2016/17 prices[†]) on local bus services by metropolitan area status and country: Great Britain, annual from 2004/05 (£millions).

Year	London	English metropolitan areas [^]	English non-metropolitan areas	England	Scotland	Wales	Great Britain	England outside London
2004/05 ^r	84	103	128	102	100	127	102	116
2005/06 ^r	87	105	135	105	106	140	106	121
2006/07 ^r	86	111	141	108	117	147	110	127
2007/08 ^r	84	112	146	108	122	147	111	131
2008/09 ^r	85	116	158	113	131	152	116	139
2009/10 ^r	86	121	164	116	140	174	120	145
2010/11 ^r	85	124	164	116	145	179	120	147
2011/12 ^r	84	131	165	117	146	183	121	150
2012/13 ^r	86	133	169	119	157	191	124	153
2013/14 ^r	88	132	170	120	156	177	124	153
2014/15 ^r	89	132	170	121	156	183	125	154
2015/16 ^r	93	135	170	124	165	181	128	155
2016/17	95	132	174	125	177	174	130	156

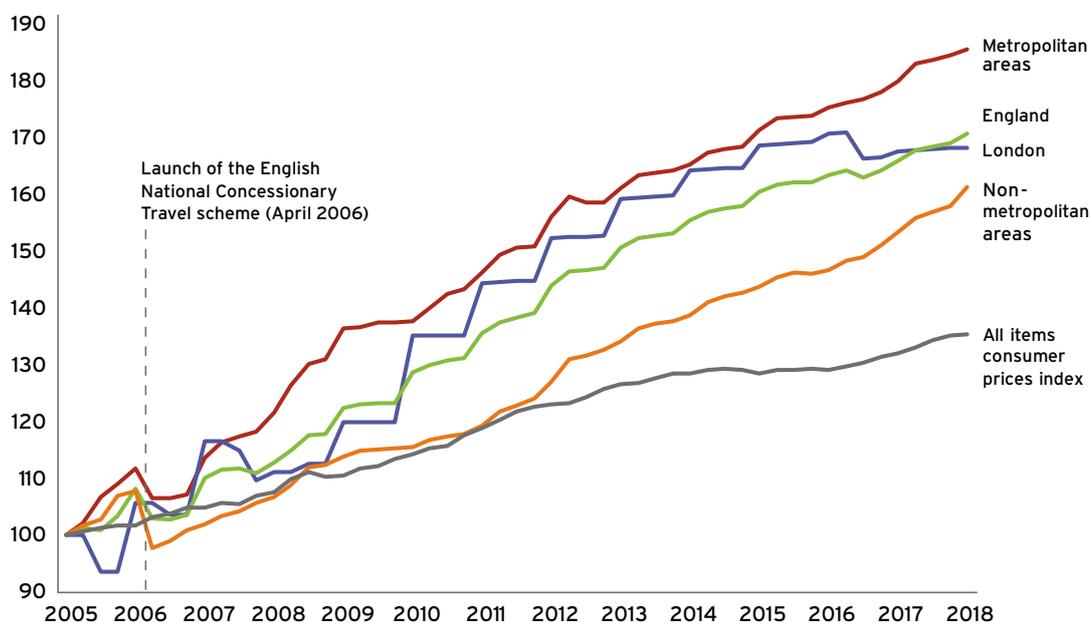
[†] Not adjusted for inflation.

* Operating revenue includes Bus Service Operators Grant, Concessionary Fare Reimbursement, contracts, other public transport support to operators and passenger fare receipts.

[^] Refers to the six Combined Authorities. These were the metropolitan areas of Tyne & Wear, Merseyside, Greater Manchester, West Midlands, South Yorkshire and West Yorkshire up to 2014-15. From 2015-16, although Durham, Northumberland and Halton are part of the Combined Authorities, the figures for metropolitan and non-metropolitan areas have been adjusted to ensure consistency with 2014/15.

^r Minor revisions have been made to earlier years data.

Figure 3: Local bus fares index by metropolitan area status and country: Great Britain, quarterly from March 2005



Index: March 2005 = 100

Source: Department for Transport Bus Statistics BUS0415a

Taking account of various elements of government support for local bus services, net support per passenger journey in English non-metropolitan areas has risen from 53.4p in 2004/05 to 79.5p in 2010/11, falling back to 65.5p in 2016/17. This latter figure compares to 52.0p in metropolitan areas.¹¹⁷ When levels of net support paid by central and local government are considered by local authority area, there are significant differences. Levels of support peaked in 2008/09 and 2009/10 and have since seen decline at varying levels, depending on decisions by local authorities to reduce support for bus services in the light of local government budget pressures. Reductions in support between 2008/09 and 2016/17 range from -2.3 per cent in Essex, to -40 per cent in North Yorkshire and -84 per cent in Cumbria.¹¹⁸

In January 2014, the Government devolved the provision of BSOG for supported bus services to local authorities. This was based on the levels of BSOG paid for the services concerned at that time. Those levels continued in subsequent years, even where local authorities withdrew some of those supported services. Therefore, the action taken by Government did nothing to help maintain supported services.

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Published:

December 2018

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