

Case for Change: SEStran Regional Bus Strategy

1 INTRODUCTION

- 1.1 The purpose of this report is to inform the Board of the key findings of the Case for Change which would lead to the creation of a SEStran Regional Bus Strategy. It is accompanied by a slide pack to illustrate, with maps and tables, the nature of the bus sector in the region. These slides will be presented at the Partnership Board meeting.

2 CONTEXT FOR THE REGIONAL BUS STRATEGY

- 2.1 At the June 2023 Sustran Partnership Board, the board agreed with the recommendations of the Item A5(d) Towards a World Class Bus Service, which included the action to begin progress on a bus strategy for the region.
- 2.2 The decision to begin the strategy was made in the context of a strong policy landscape, with bus highly commended in the Regional Transport Strategy, national documents like NTS2 and the legislation following on from the Transport (Scotland) Act of 2019.
- 2.3 Given the current fiscal situation, Transport Scotland paused the Bus Partnership Fund for the year 2024/25. Whilst this was discussed at the March 2024 board as a frustrating reality for authorities, operators and the travelling public, if anything, it further highlights the need to consider solutions within our region.

3 Activity to date

- 3.1 SEStran applied to and won £150k from the TS Community Bus Fund in November 2023, to fund the Regional Bus Strategy. On 29th January 2024, we procured Systra and Stantec, to work together to produce our strategy, having scored highest against the tender criteria. Further, Systra's involvement in SPT's bus strategy and Stantec's role in crafting our RTS made them ideal candidates.
- 3.2 Working with Systra/ Stantec, we have facilitated workshops with local authorities and operators during April, to understand the opportunities, issues and challenges at play in our region.
- 3.3 A page was created on the website and the draft EQIAs are visible there. We will continue to add documents to this page.
- 3.4 SEStran officers, with Systra/ Stantec, have developed the draft Case for Change. The distilled summary is Appendix One and the accompanying slide deck is Appendix Two.

- 3.5 A working draft of the case for change was shared with local authority officers for their feedback.

4 Key findings of the case for change

- 4.1 The Case for Change is strong. This is particularly true because doing nothing will result in ongoing decline in patronage and network.
- 4.2 There is wealth of environmental and transport policy, which could be better realised by strengthening the bus sector. In actual fact however, bus patronage and network size is down, whilst private car ownership continues to increase.
- 4.3 Local authorities are subsidising weekend and evening services to maintain functioning bus networks, but budget constraints are reducing this year by year. Bus journey times in some parts of the region are triple that of the same car trip, making bus unattractive.
- 4.4 The picture in Edinburgh is brighter, due to the strength of Lothian Buses and the density of population, but buses from surrounding authorities are slowed entering the city by congestion and of course, become part of the traffic themselves.
- 4.5 Population growth, major housing developments, under-22 concessions and the policy environment make now an ideal time to improve bus in the region.
- 4.6 There are significant constraints around funding and public behaviour change, which will present a challenge.

6 NEXT STEPS

- 6.1 Subject to board approval, SEStran officers will continue to work with Systra and Stantec to develop the strategy and options to appraise.
- 6.2 SEStran will continue to advocate for a resumption of the Bus Partnership Fund.
- 6.3 Stakeholder engagement + SEStran will update the Partnership Board throughout the work packages, to gain their feedback and necessary approvals.

7 RECOMMENDATIONS

It is recommended that the Board:

- 7.1 Note the summary of the Case for Change and provide feedback.
- 7.2 Give permission to continue with the next aspects of the strategy development, primarily the development of a draft strategy and corresponding Outline Options Appraisal.

- 7.3 Requests the Partnership Director to continue to engage with the government on reopening the Bus Partnership Fund

Rachael Murphy
SEStran Strategy Manager
23rd May 2024

Appendices

1. Case for Change
2. Slide deck to be presented at board.

Background Paper:

1. Implementation of Part 3 (Bus Services) of the Transport (Scotland) Act 2019, Partnership Board Meeting Friday 24th September 2021.

<https://sestran.gov.uk/wp-content/uploads/2021/09/2021-09-24-Item-A7-Implementation-of-Part-3-Bus-Services-of-the-Transport-Scotland-Act-2019.pdf>

Policy Implications	The aspiration for a regional bus strategy to facilitate a World Class Bus Service aligns with objectives and actions in SEStran's Regional Transport Strategy and the National Transport Strategy 2.
Financial Implications	SEStran applied to and won £150k from the TS Community Bus Fund in November 2023, to fund the Regional Bus Strategy. Thus, the actions proposed in the report will have no new financial implications, any subsequent proposals will be brought back to the Partnership Board for approval. There is a risk if we do not progress the strategy, that bus becomes too costly for LAs to sufficiently subsidise.
Equalities Implications	The proposed Regional Bus Strategy will support the equalities objectives in the Regional Transport Strategy. Without this work, there is a risk that a key facilitator of equalities is impinged.
Climate Change Implications	The aspiration for a regional bus strategy to facilitate a World Class Bus Service will support and positively impact on SEStran's Climate Change objectives as outlined in the Regional Transport Strategy. Without improving our public transport offering, we risk increased private car use and corresponding worsening climate.

SUMMARY

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

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

The Case for Change reflects and builds on the findings of the RTS, undertaking a detailed analysis of the bus network in the SEStran region, considering both supply and demand, and setting out how the existing bus network is shaped by the current 'model' under which services are delivered. The Case for Change concludes by setting out a vision for the SRBS and from this a set of core objectives. These objectives form the basis of a set of policies around which the SRBS will be developed.

The foundations of this Case for Change are embedded in the SEStran **Regional Transport Strategy (RTS)** (2021 – 2035), and its associated vision, objectives and policies.¹ The Case for Change produced in advance of the RTS set out the socio-economic context for the region and the national policy context in which the RTS and the Regional Bus Strategy sit - the most pertinent elements of context for this study are:

- The SEStran region is a growing region – population grew by 7.5% between 2009 and 2019 and is projected to grow a further 6% by 2035. This total figure however masks projected drops in Clackmannanshire and Fife and rapid growth in others, most notably Midlothian.
- This growth is allied to reductions in average household size (persons / household) creating even greater demand for housing
- Car ownership is high across the region and continues to increase
- The settlement pattern is diverse ranging from 'large urban area' to 'remote rural' areas and this clearly brings a range of issues for the delivery of public transport and bus services in particular

POLICY PROBLEMS

The principal policy problem is that there is a raft of policy, the aims of which imply **reduced car use and increased use of public transport**. In the SEStran region, bus is very much the dominant form of public transport and would be required to provide the bulk of this shift but in the decade prior to the pandemic, **bus use fell by 11% across the region** and by 2022-23 was only 88% of pre-pandemic levels, despite the introduction of free bus travel for the under 22s. The supply of bus services, **bus vehicle kilometres, also fell from a peak in 2007-08**. However, **these trends vary markedly across the region** with some local authorities seeing much lower levels of bus use and greater falls in bus use than others. At the national level, bus use declined steadily between the mid-1970s and the turn of the century, before growing slowly until the financial crisis in 2008 then falling steadily thereafter.²

Whilst bus had a high mode share for travel to Edinburgh city centre in the 2011 census, **travel to work commuting in the region was dominated by car outside of Edinburgh**, with a bus mode share of 7%-9%. The highest absolute number of car trips (and therefore car kilometres) is within SEStran local authorities (excluding Edinburgh) where the bus mode share was only 9%.³

In short, the **supply of bus services and passenger numbers are falling at a time when the direction of policy requires sustained growth** – both to encourage mode shift from car and to provide greater equality of opportunity for people across the region who do not have access to a car or who would prefer not to use a car.

There has been sustained **decline in bus passenger numbers compared to road traffic and rail** (the latter had seen a very large increase before COVID-19).⁴ By 2022/23, bus and rail passenger numbers were still substantially below pre pandemic levels, yet road traffic levels had almost fully recovered.

Reflecting the decline in passenger numbers, **satisfaction with public transport** as measured through the Scottish Household Survey (and averaged across the SEStran local authorities) **dropped in the decade prior to the pandemic and this has dropped further post-pandemic**.⁵ Again, this measure **varies widely across the region**

¹ [SEStran-2035-Regional-Transport-Strategy.pdf](#)

² [Scottish Transport Statistics 2023 | Transport Scotland](#)

³ [SEStran-2035-Regional-Transport-Strategy.pdf](#)

⁴ [Transport and Travel in Scotland 2022 | Transport Scotland](#) (Travel Diary Tables, TD2e)

⁵ [statistics.gov.scot](#)

with the percentage of those 'very satisfied' or 'fairly satisfied' ranging from around 85% (City of Edinburgh) to less than 40% (Falkirk). This again reflects the passenger usage trends seen at the local authority level. The satisfaction levels with different aspects of bus services also varies widely across the region.

SUPPLY SIDE PROBLEMS

Many regional bus services across the region are Edinburgh-focussed and **options for bus for travel between local authorities outside of Edinburgh are more limited**. The City of Edinburgh has stronger bus services compared to the other local authorities with greater access to buses, higher bus frequencies, and the strongest Sunday services.

The commercial bus network is focused around key urban areas and high-volume corridors in the region and there is a **need for subsidy to support services in more rural areas**. These subsidised services are increasingly vulnerable given the rise in tender prices and real-terms reductions in council budgets, and as a result many smaller communities in our rural areas are not served by scheduled bus services. **Local authorities have no control over the commercially provided network**.

Postcode level analysis has been used to consider access to the bus network, determined through consideration of the Scottish Government's Urban Rural 6-fold classification.⁶ This analysis at full-postcode level provides enhanced granularity to inform the Case for Change, with each postcode representing a handful of households. Summing the associated number of households contained within each postcode which meet different criteria has enabled a detailed understanding of access to the bus network and services, both across the region and by local authority, with the quality of access at very specific locations being able to be understood. This will also provide a baseline for later policy development and options appraisal. This analysis highlights:

- Some households do not have **convenient access to a formal bus stop** and are therefore excluded from the bus network or require a long walk, bike ride or lift to access the network – this figure is **4%** across the region rising to **15%** in the Scottish Borders.
- Low **service frequency** can make bus travel an unattractive option – service frequency varies hugely across the region with high proportions of households in Scottish Borders and West Lothian having, at best, an hourly service. Outwith Edinburgh, relatively few residents have what could be regarded as a turn-up-and-go service.
- The need to **interchange** can be a deterrent to bus use given the uncertainty about connections, potential physical access issues, implications for journey time and potentially cost implications if more than one operator is involved – outside of Edinburgh only **50%** of households have access to a direct bus connection to Edinburgh and only **7%** of all SEStran residents benefit from direct connections to Glasgow, **9%** to Dundee and **8%** to Stirling.
- Some households have poor access to bus services in the **evening** which is likely to lead to forms of exclusion and increased car use. Communities that see their bus services stop in the evening cannot enjoy the full range of services provided in bigger neighbouring towns. **8%** of households have no bus service after 7pm, rising to around **18%** after 10pm. Access to evening services varies significantly across the region. Most households in Edinburgh and Fife have access to a bus service in the evening - however households in Falkirk, West Lothian and particularly Scottish Borders have more limited access to evening bus services.
- The absence of **Sunday services** is also a problem for some, especially those working in retail and hospitality. **10%** of households across the region do not have a Sunday bus service (in addition to the **4%** with no service at all) rising to over **20%** in Clackmannanshire, Falkirk, Scottish Borders and West Lothian. Where services do run these will typically be at a reduced frequency. This will lead to some not being able to take up opportunities and increased car use.

Travel times by bus are usually long and are generally far longer than by car. Across a sample of travel between 20 SEStran towns, journey times by bus are on **average 2.4, 2.5 and 3.0 times longer** than travel by car in the AM peak, inter-peak and PM peak. Only for travel to / from Edinburgh is the bus more competitive, with travel times by bus being on average 1.6, 1.7 and 2.2 times those of the bus in the AM peak, inter-peak and PM peak period.⁷ However, even for travel within Edinburgh travel by bus can take significantly longer than by car, especially when trips do not involve the city centre. Long travel times, especially if combined with the need to interchange and with the cost, uncertainty and accessibility issues which this can involve, are a significant deterrent to bus use, and people will generally use a car if one is available to them, unless there is a compelling reason not to do so.

Congestion, bus punctuality and the journey time reliability of buses significantly impacts the levels of bus patronage and bus satisfaction. Urban **congestion** is a serious problem facing bus operators in SEStran, and a particular issue for those operating in and around Edinburgh. Congestion increases bus operating costs and journey times in

⁶ [Urban Rural Classification - Scotland \(spatialdata.gov.scot\)](https://spatialdata.gov.scot/)

⁷ Analysed using Google API data

general, which affects the price and attractiveness of bus services, particularly on longer bus trips, leading in turn to lower passenger numbers.⁸ Therefore, the expansion and effective enforcement of bus priority measures to prevent issues such as vehicles parking in and blocking bus lanes is important in countering this.

Previous analysis from the RTS has identified communities across the region where **high levels of deprivation are allied to poor connectivity by public transport**, e.g., high employment deprivation and relatively poor access to the job market.⁹ Improved public transport connectivity may be one element of addressing this deprivation and improving **equality of opportunity** across the region.

Bus services across the region have been subject to a **high degree of change** over the last 20 years or so. Changes in the main operator serving an area and also changes to individual services create uncertainty amongst bus users and those who may consider using the bus. One consequence of this though has been that Lothian Buses has extended its operations into the Lothians which is seen as a benefit by residents of these areas. This lack of certainty (in contrast to the permanence say of a railway station or tram / Bus Rapid Transit) means that people are less likely to make life-decisions (e.g., where to work and live) on the basis of a bus service in the same way that they might for other form of public transport.

Bus **fares** have increased in real terms since the turn of the century, and at a faster rate than rail fares and the cost of motoring - so the cost of travel by bus helps explain the reduction in passenger numbers.¹⁰ The proportion of all bus passengers using concessionary fares has jumped sharply in Scotland to almost 50% with the introduction of the under 22s scheme – however those without access to good bus services cannot take full advantage of these schemes, so the benefits go disproportionately to the areas with the highest quality services.¹¹ The absolute level of fares (and fare-capping) also varies widely across the region bringing a further inequality.

Ticketing options can be complex across the region¹² and most tickets are also only useable on a single operator's services. More, and simpler multi-operator (and multi modal) tickets are needed to make it easier, cheaper and more attractive from a user perspective to travel by bus, especially for longer journeys across the region. The multi-modal and multi-operator OneTicket is not widely used.

There is an absence of true **competition between bus operators** across the region and what are essentially local monopolies have developed over time, so **the benefits of competition envisaged by the 1985 Act are not evident**. A reduction in the number of operators also affects bidding for tendered contracts where the absence of healthy competition may lead to higher tender prices.

Bus services have seen **competition from other modes**. Most notably there is a long-term trend of increased car ownership, and this continues to be seen in all the SEStran local authorities. The use of rail also grew sharply in the years prior to the pandemic in part reflecting major investments in the rail network affecting the region. Competition from car and train is therefore a key reason for the long-term decline in bus passenger numbers. Investment in high-quality segregated active travel connections in urban areas in particular provides further competition, both in terms of people switching from bus to bike, and also from these schemes reducing the road space available to general traffic which can affect bus journey times and reliability if buses are not suitably prioritised.

OPPORTUNITIES

The key opportunities identified are as follows:

- The SEStran region is projected to see significant **population growth**.¹³ More people in the region means more potential bus passengers and associated revenue.
- **Major developments** (e.g., Heartlands, Blindwells, West Edinburgh) provide an opportunity to embed bus travel as the norm for people moving into these developments before car use becomes established and deep rooted.^{14,15,16} These, and indeed all new developments should be planned around good access to high quality bus services from the outset.
- There is a prevailing national, regional and local **policy environment** which seeks to reduce car kilometres, especially in Edinburgh where an ambitious 30% target has been set.¹⁷ A significant shift from car to bus will be

⁸ [SEStran-Main-Issues-Report.pdf](#)

⁹ [SEStran-2035-Regional-Transport-Strategy.pdf](#)

¹⁰ [Chapter 2: Bus and Coach Travel | Transport Scotland](#)

¹¹ [Chapter 2 - Bus and coach travel | Transport Scotland](#)

¹² [SEStran-Main-Issues-Report.pdf](#)

¹³ [SEStran-2035-Regional-Transport-Strategy.pdf](#)

¹⁴ [Heartlands Development - Invest in West Lothian](#)

¹⁵ [Blindwells - A flagship residential site located in East Lothian](#)

¹⁶ [West Town Edinburgh \(west-town-edinburgh.com\)](#)

¹⁷ [Targets for a sustainable transport future – The City of Edinburgh Council](#)

required to meet this target and therefore the range of policies adopted by the City of Edinburgh and neighbouring local authorities should all encourage greater bus use.

- The **Transport (Scotland) Act 2019** provides a range of new powers to local authorities and others to be more active in the planning and delivery of bus services, including (i) the development of Bus Service Improvement Partnerships which would place firm commitments to improve bus services and infrastructure on a legal footing, (ii) local transport authorities in Scotland being permitted to establish their own new municipally owned bus operator, and (iii) the quality contracts process being replaced by a revised Bus Franchising Scheme.¹⁸
- Stakeholder engagement undertaken as part of this work noted an **appetite for increased partnership working** between operators and other stakeholders, including on cross-boundary issues.
- The **under 22s scheme** may promote increased or indeed lifelong bus use habits amongst some in that generation, which may arrest the decline in bus use and growth in car ownership.¹⁹
- As **public awareness of environmental issues** grows, more people are interested in sustainable travel options. Buses can play a role in reducing individual carbon footprints and providing people with alternatives to car ownership.
- A range of **new technologies** will provide opportunities to drive innovation and efficiency in the bus sector, including for example in scheduling, ticketing and automation etc.

CONSTRAINTS

The key constraints identified are as follows:

- The primary constraint is around **funding**, and this was confirmed by all stakeholders engaged with as part of this study. There has been a real term reduction in local authority spending on subsidised services and increased tender prices mean that the subsidy cost per bus kilometre has also increased. Local authorities are therefore getting fewer bus kilometres per £ spent on subsidy. Local authorities are becoming increasingly under strain in terms of their internal capacity and the pressure on resources that they face. As a consequence, their ability to deliver and manage bus services is under pressure.
- Capital spending on bus priority infrastructure via the **BPF** has been paused in 2024/25.²⁰ This has affected the development of a range of schemes across the region and the future of this fund remains uncertain at the time of writing.
- The ability of local authorities and other public bodies to act in the bus market is still bound by **competition law**, unless the most radical of measures are adopted.
- Much infrastructure funding is currently directed at **active travel** schemes.²¹ The implied reallocation of road space to form dedicated cycle tracks can impact on the road space available to general traffic and this can be disadvantageous to the bus if it too is not prioritised.
- Some of the **assets** used to deliver bus services are not under council ownership. For example, at the time of writing, the future of Edinburgh Bus Station in St Andrews Square is uncertain. The site is owned by a pension fund which may be seeking a higher value use of this site. This lack of control around the future of the bus station is a constraint on meaningfully planning the future role of the bus station. Similarly, not all of the Park & Ride sites around Edinburgh are under council ownership which creates a constraint on maintaining and developing these sites.
- Some people **perceive** buses as a less desirable and lower quality mode of transport compared to private cars or trains. Overcoming this perception by improving quality and passenger comfort is crucial.
- The **Park & Ride sites** around Edinburgh are potentially not in the best locations with the right services to provide a more attractive option than driving into Edinburgh's suburbs and parking near a major bus corridor.

STRATEGY VISION, OBJECTIVES AND DESIRED OUTCOMES

This SEStran Case for Change presents a thorough examination of the current situation of the bus network in the region and what is needed to achieve the vision that is presented in the RTS.²² The analysis as set out in this

¹⁸ [Transport \(Scotland\) Act 2019 \(legislation.gov.uk\)](https://legislation.gov.uk/ukpga/2019/16/contents/enacted)

¹⁹ [Executive summary | Transport Scotland](#)

²⁰ [Bus Partnership Fund | Transport Scotland](#)

²¹ [Getting Scotland walking, wheeling and cycling | Transport Scotland](#)

²² [SEStran-2035-Regional-Transport-Strategy.pdf](#)

document highlights that while travel by bus needs to increase to meet a wide range of policy objectives, including those set out in the RTS, bus services and patronage have been broadly flat or in decline over the last decade and more, with a very varied picture across the region.²³ Across the bus network in the region therefore:

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

These factors are increasing the widening gap between the existing bus network and the vision for a high-quality class network as set out in the RTS, as evidenced by the trends in passenger numbers and satisfaction with bus services. For passengers, the current operating model means:

- Fares and ticketing can be complex and more expensive with limited convenient integration between operators and / or modes
- Bus routes are run on a commercial basis meaning some areas are better served than others – but bus services can generate wider economic, social and environmental benefits which can mean that it is economically efficient to increase supply above the levels determined by the commercial market
- Customer standards and satisfaction varies vastly across the region given different service providers
- A loss in passenger confidence due to instability in the bus network (due to reduced services, high journey times, changes in routes, poor reliability etc.) is evident in places
- There is some competition between public transport and sustainable modes rather than integration

In terms of present operation, the current operating models across the SEStran region:

- Cannot provide a truly planned and integrated transport network in terms of timetabled interchange and fares
- Cannot effectively and efficiently coordinate a long-term transport strategy that supports the RTS vision
- Means there is very limited control over the routes operated, service frequencies, fares charged, or tickets sold by operators
- Needs to provide increasing public sector funding to support socially necessary services to fill gaps in provision at time when local authority funding is constrained – this has been reducing for some years now

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

Given this, the vision for the SRBS has been set:

To provide a high quality bus network for the whole region which is fully integrated with other forms of transport and increases passenger numbers and passenger satisfaction, to support the social, environmental and inclusive economic development of the region

This vision flows into three strategy objectives, which in turn support the fundamental transport outcome for the strategy – **to increase bus passenger numbers to align with a range of policy outcomes**. Achieving these outcomes would in turn provide a wide variety of benefits to society, which would align to policies around decarbonisation, social inclusion and the widening of opportunities, economic growth and placemaking.

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

- (i) Level of Service – this policy area considers how, where and when the bus network operates. For example, it will set out ambitions for the hours of operation of bus services, how frequently buses run, and the connectivity the bus network needs to provide to widen opportunity and increase car use across the rural and urban landscape of the region.

²³ [Scottish Transport Statistics 2023 | Transport Scotland](#) (STS Chapter 02, Table 2.2b)

- (ii) Affordability – the policy will set out ambitions related to the affordability of travel by bus across the region, including factors such as the structure, legibility, and integration of fares
- (iii) Service Quality – the policy will focus on the other important aspects that allow the delivery of a high-quality bus service. This includes topic areas such as interchanges and bus stops, accessibility, information, ticketing, vehicle and driver standards, and service reliability and punctuality

Next Steps

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

The Options Appraisal will assess, based on an approach which is compliant with the Scottish Transport Appraisal Guidance (STAG), how **different approaches** can deliver these policies and hence the objectives and vision, together with the associated costs and therefore the value for money.

DRAFT

SEStran Regional Bus Strategy (SRBS)

Case for Change



South East  of Scotland
Transport Partnership

Agenda

1. SRBS Introduction
2. Problems
3. Opportunity for board comment
4. Opportunities
5. Opportunity for board comment
6. Constraints
7. Opportunity for board comment
8. SRBS Vision/ Objectives
9. Opportunity for board comment
10. Closing Thoughts

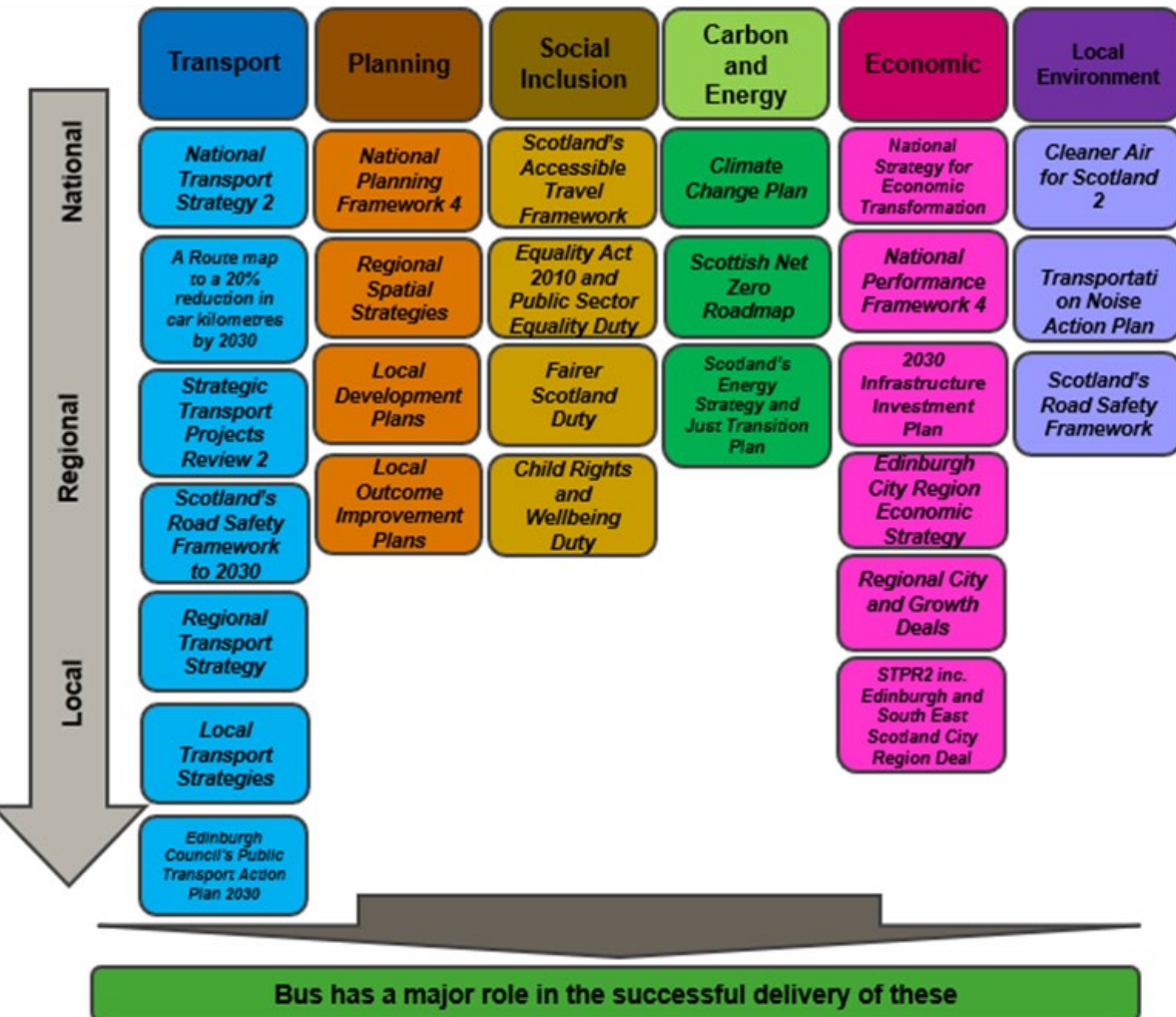


South East of Scotland
Transport Partnership

Problems

Case for Change

Key Policy Context



- A raft of national, regional and local policy implies the need to reduce car use and increase the use of public transport to:
 - Meet net-zero ambitions
 - Improve equality of opportunity for all
 - Reduce the impact of the car on our local environments
- This is particularly the case in the SEStran region which is projected to see continuing population growth (+6% by 2035) and car ownership continues to rise



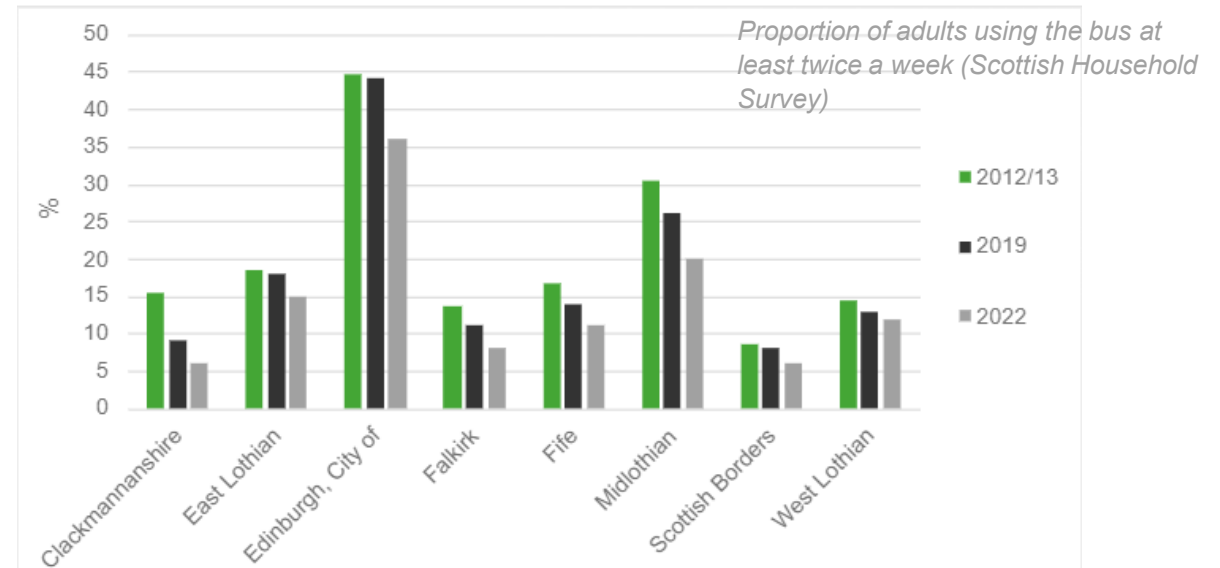
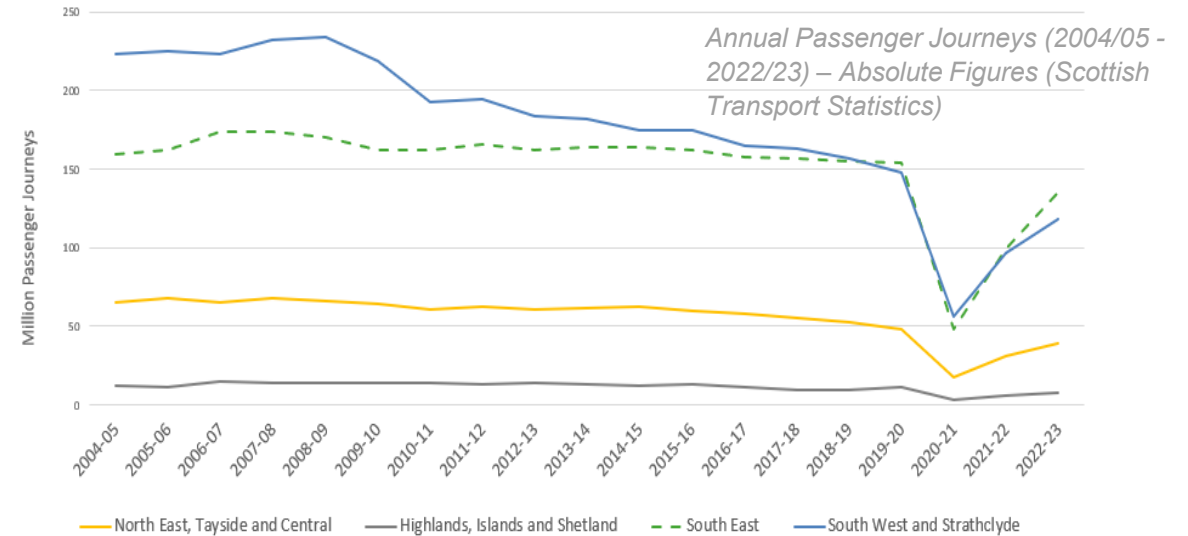
South East of Scotland
Transport Partnership

Problems

Demand & Satisfaction

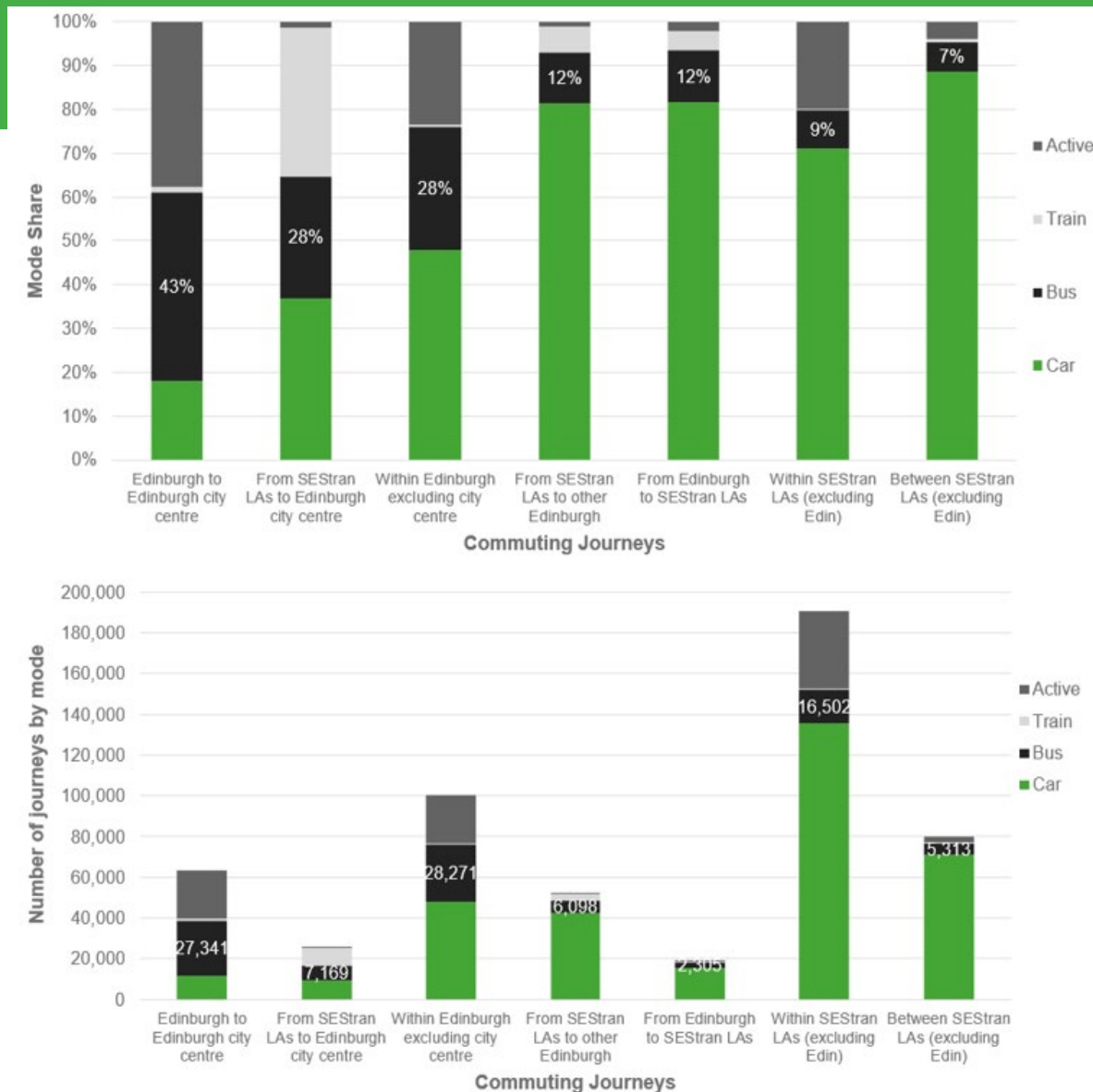
....but bus services and passenger numbers are falling at a time when the direction of policy requires sustained growth

- In the decade prior to the pandemic, **bus use fell by 11% across the region** and by 2022-23 was only 88% of pre-pandemic levels
- Decline in bus passenger numbers compared to **increased road traffic and large increases in rail passengers**
- People's use of buses and the trend over time **varies widely across the region**
- Supply of bus services (bus vehicle kilometres) also fell from a peak in 2007-08



Travel to work data by mode varies significantly regionally (2011)

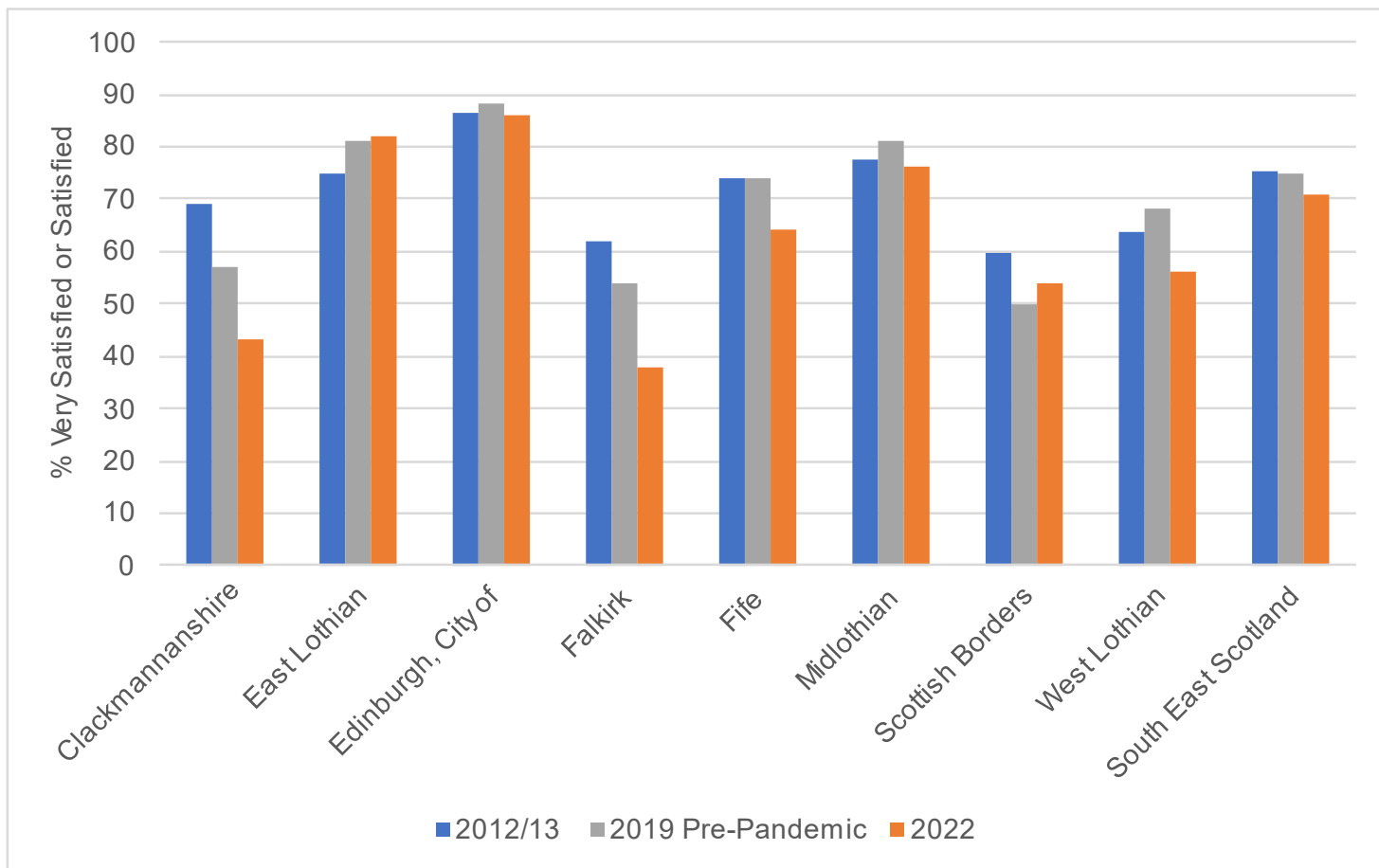
- Bus had a high mode share for travel to Edinburgh city centre
- Travel to work commuting in the region was dominated by car outside of Edinburgh in 2011 with a bus mode share of 7%-9%
- The highest absolute number of car trips is *within SEStran local authorities (excluding Edinburgh)* where the bus mode share was only 9%



Travel to work by mode of travel, 2011 (mode share percentage - top, and number of journeys by mode - bottom)

Public satisfaction with public transport varies significantly across the region

- In 2022, the percentage of those 'very satisfied' or 'fairly satisfied' ranged from around 85% (City of Edinburgh) to less than 40% (Falkirk)
- In some parts of the region, satisfaction levels have dropped significantly since 2012/13
- Satisfaction with specific aspects of bus services also varies widely across the region



Scottish Household Survey results from the SEStran council areas, 2012/13 to 2022

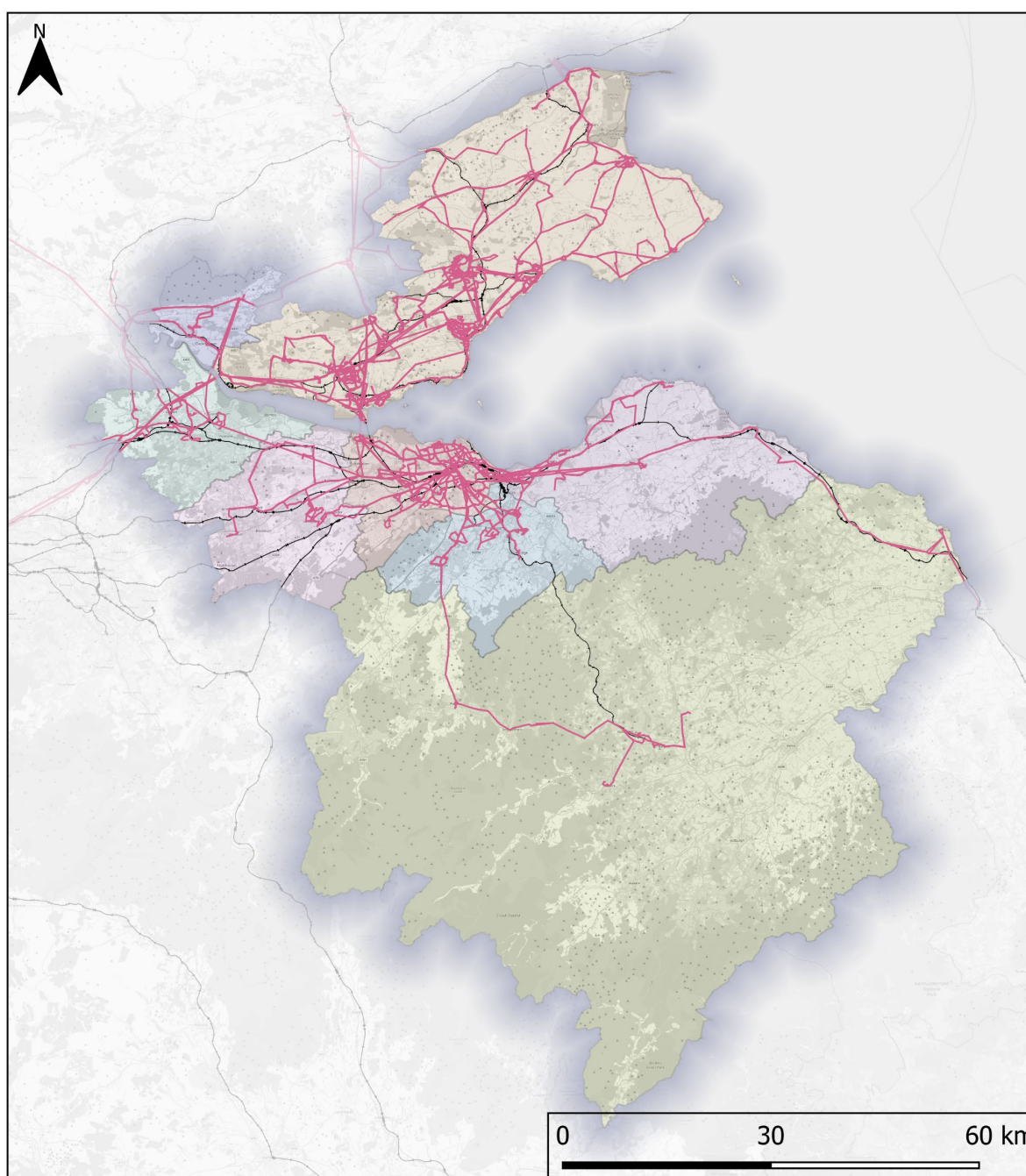


South East of Scotland
Transport Partnership

Problems

Supply Side

Commercial Services



Study Area

Commercial vs. Subsidised Services

Commercial

Rail Lines

Local Authority Boundaries

City of Edinburgh

Clackmannanshire

East Lothian

Falkirk

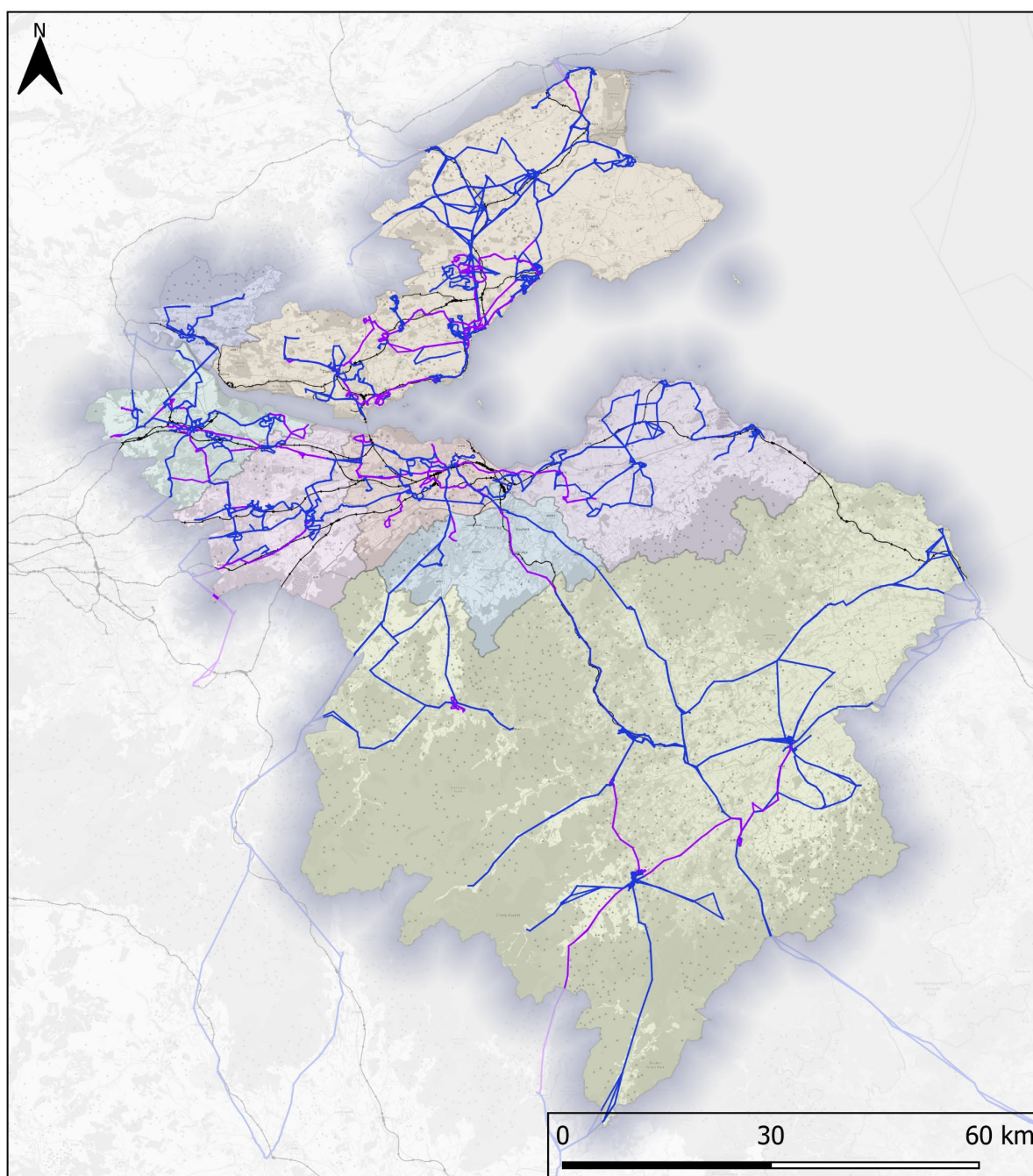
Fife

Midlothian

Scottish Borders

West Lothian

Fully and partly subsidised services



Study Area

Commercial vs. Subsidised Services

Partially Subsidised

Subsidised

Rail Lines

Local Authority Boundaries

City of Edinburgh

Clackmannanshire

East Lothian

Falkirk

Fife

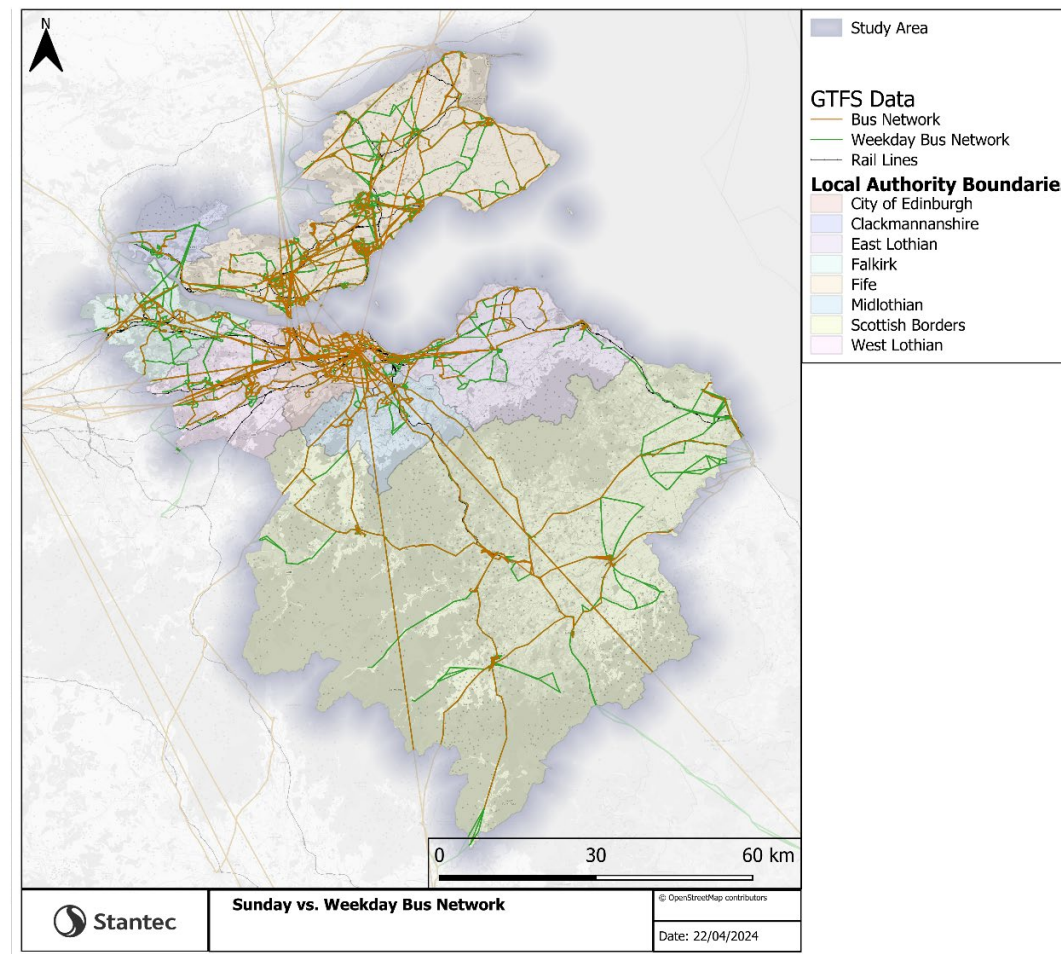
Midlothian

Scottish Borders

West Lothian

Some households have poor access to bus services in the evening and Sundays likely to lead to exclusion and car use

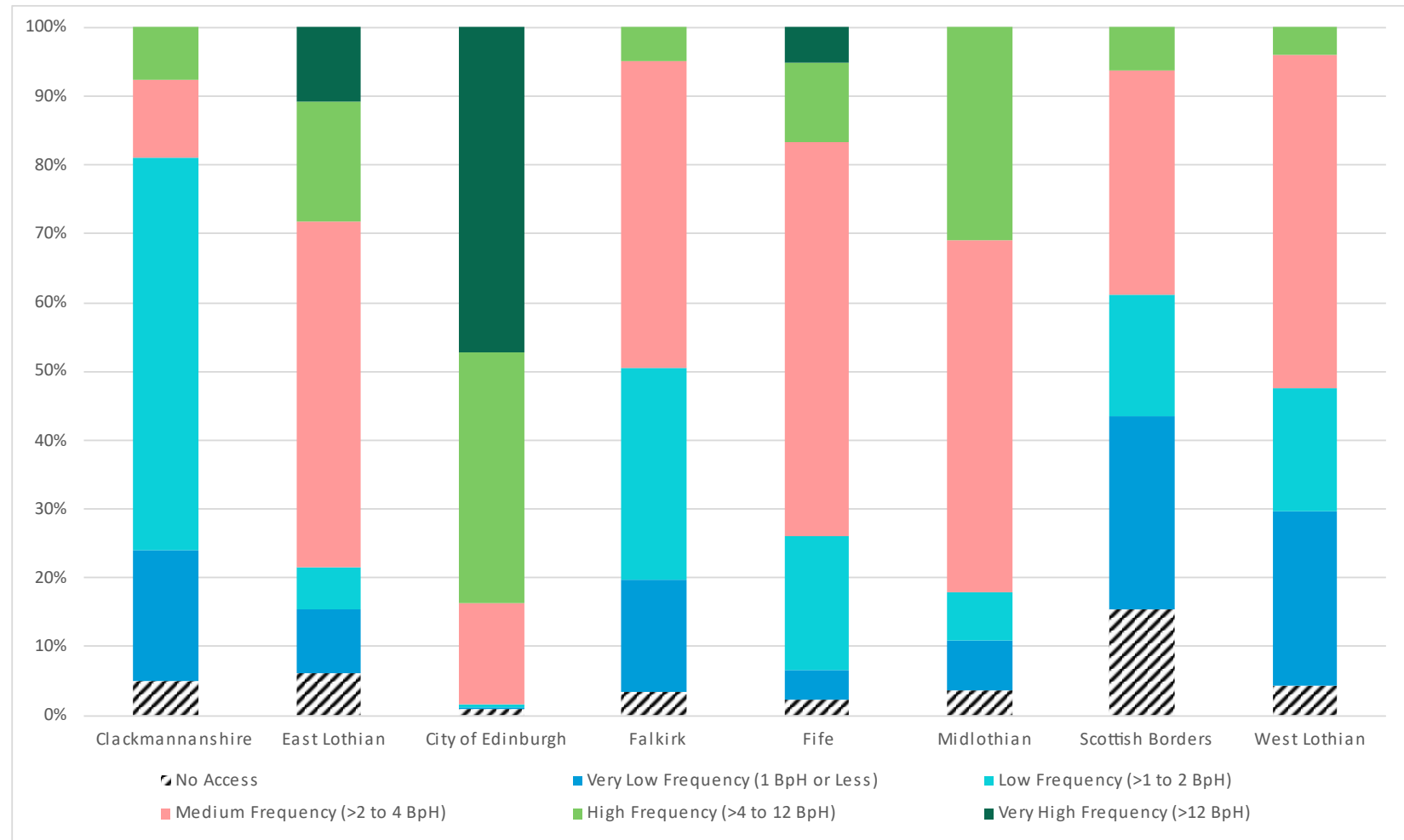
- 8% of households have no bus service after 7pm, rising to around 18% after 10pm.
- Access to evening services varies significantly across the region.
- Most households in Edinburgh and Fife have access to a bus service in the evening - however households in Falkirk, West Lothian and particularly Scottish Borders have more limited access to evening bus services
- 10% of households across the region do not have a Sunday bus service rising to over 20% in Clackmannanshire, Falkirk, Scottish Borders and West Lothian.
- Where Sunday services do run these will typically be at a reduced frequency



Weekday bus services versus weekday network

Absence of convenient bus stop and low service frequency can make bus travel an unattractive option

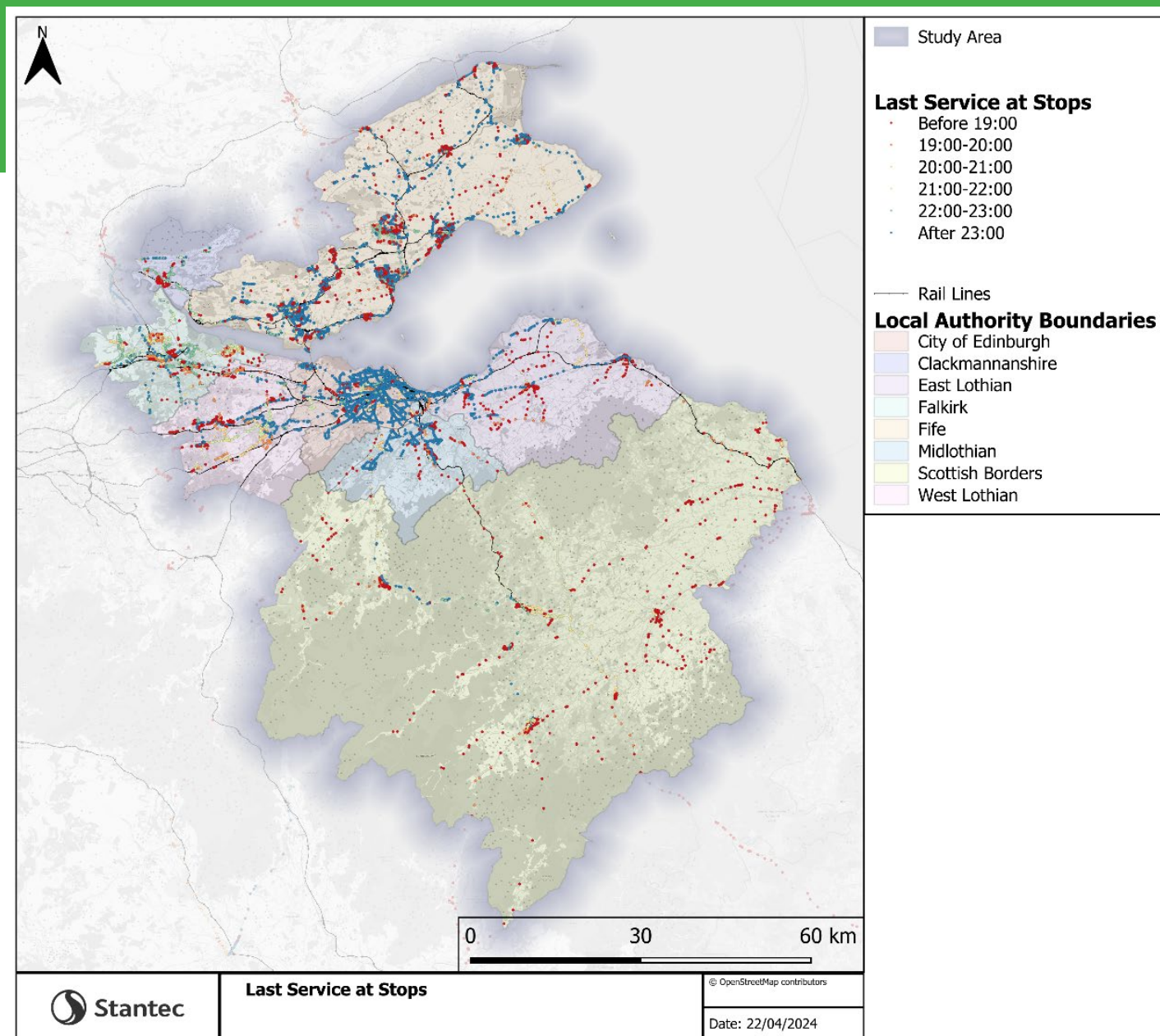
- 4% of SEStran households do not have **convenient access to a bus stop** – rising to 15% in Scottish Borders
- Service frequency varies hugely across the region with high proportions of households in Scottish Borders and West Lothian having an hourly service
- Outwith Edinburgh, relatively few residents have what could be regarded as a ‘turn-up-and-go’ service



Percentage of households with defined bus frequencies, by SEStran local authority

Some households have poor access to bus services in the evening and Sundays likely to lead to exclusion and car use

- 8% of households have no bus service after 7pm, rising to around 18% after 10pm.
- Households in Falkirk, West Lothian and particularly Scottish Borders have more limited access to evening bus services
- 10% of households across the region do not have a Sunday bus service rising to over 20% in Clackmannanshire, Falkirk, Scottish Borders and West Lothian.
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Weekday last service stops

Travel times by bus are usually long and are generally far longer than by car

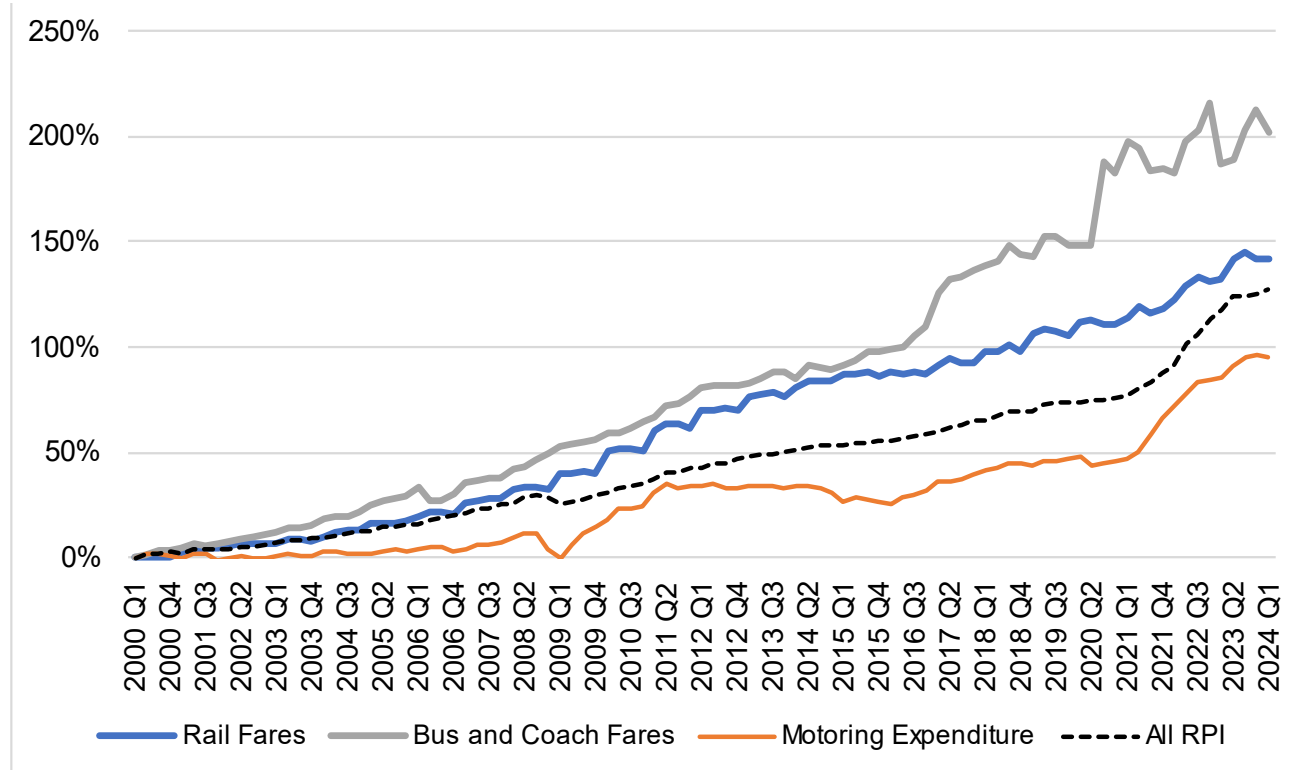
		Destination																				
	Ratio	Alloa	Bathgate	Dalkeith	Denny	Dunfermline	Edinburgh	Falkirk	Galashiels	Glenrothes	Haddington	Hawick	Kelso	Kirkcaldy	Linlithgow	Livingston	Musselburgh	North Berwick	Peebles	Penicuik	St Andrews	Averages
Origin	Alloa		3.7	3.7	2.9	2.5	2.4	3.0	3.2	2.9	3.4	4.5	6.7	2.7	3.7	4.6	3.3	3.2	5.3	3.8	2.5	3.6
	Bathgate	3.9		3.7	4.4	3.5	1.7	2.4	2.7	3.0	2.7	3.6	7.9	3.2	1.4	3.1	2.7	2.6	2.9	3.4	2.6	3.2
	Dalkeith	4.2	3.8		3.8	3.1	1.8	3.1	1.7	2.5	3.7	1.7	2.0	2.7	3.4	3.2	1.8	2.5	2.6	2.3	2.4	2.7
	Denny	4.1	3.7	3.9		2.4	2.3	2.2	3.4	2.5	3.2	6.0	7.7	2.5	3.7	4.1	3.2	2.9	3.4	3.8	2.5	3.6
	Dunfermline	3.5	2.9	2.7	3.4		1.3	1.8	2.1	1.7	2.1	1.9	6.3	2.4	3.5	2.9	2.2	2.4	2.2	2.7	1.7	2.6
	Edinburgh	2.6	1.7	1.4	2.1	1.5		1.7	1.3	1.5	1.2	1.5	3.6	1.4	1.5	1.8	1.4	1.5	1.4	1.5	1.7	1.7
	Falkirk	2.8	2.5	3.2	2.0	2.2	1.6		2.9	2.4	2.7	5.0	3.3	1.2	4.0	3.4	3.0	2.6	2.2	4.0	1.0	2.7
	Galashiels	3.1	2.8	2.6	3.3	2.5	1.8	2.5		2.2	3.4	2.0	5.8	2.2	2.6	2.4	4.1	1.3	2.1	4.0	3.9	2.9
	Glenrothes	3.0	2.7	2.4	3.1	1.7	1.3	2.2	2.2		2.1	4.2	2.5	6.4	3.1	2.4	2.5	2.4	2.0	1.5	3.4	2.7
	Haddington	3.4	3.1	3.2	3.1	2.4	1.6	2.7	2.5	2.3		6.3	5.2	2.0	2.9	1.7	4.1	6.3	2.3	5.1	2.8	3.3
	Hawick	2.3	2.0	5.7	3.0	1.9	2.7	1.1	6.5	1.9	3.6		6.9	2.1	2.4	2.1	2.8	1.5	2.6	3.5	1.2	2.9
	Kelso	2.9	2.4	9.6	4.0	2.5	3.3	1.7	6.0	2.3	3.4	5.3		2.7	2.9	2.9	4.1	2.1	2.7	3.8	4.0	3.6
	Kirkcaldy	2.9	2.7	3.6	2.1	2.5	2.2	4.3	1.1	7.3	1.6	3.9	2.7		3.3	2.6	2.7	2.4	2.1	2.2	2.9	2.9
	Linlithgow	1.9	4.7	2.4	4.0	2.2	0.9	6.0	1.8	2.8	3.3	5.0	3.7	2.2		3.6	3.3	2.5	2.4	5.0	4.5	3.3
	Livingston	1.9	5.5	4.0	2.7	2.0	2.1	4.2	2.0	2.5	3.6	5.1	3.8	2.0	4.1		3.5	2.5	2.5	4.8	1.9	3.2
	Musselburgh	2.4	1.4	10.3	2.3	1.2	4.0	2.4	2.2	1.2	9.3	5.3	2.5	1.9	2.8	2.2		2.7	1.9	5.6	4.0	3.5
	North Berwick	2.6	1.8	7.0	2.4	1.7	3.3	3.0	2.6	1.2	9.1	5.6	4.6	2.4	2.6	1.7	4.6		2.2	4.7	1.3	3.4
Peebles	2.6	2.0	4.0	2.7	1.7	2.6	1.4	3.8	2.1	3.6	4.7	2.8	2.3	2.6	2.3	4.0	1.2		7.1	1.6	2.9	
Penicuik	3.0	2.0	6.3	2.8	1.9	3.1	2.3	2.1	2.2	4.8	5.2	2.2	2.2	3.5	2.6	3.7	1.2	6.1		5.9	3.3	
St Andrews	2.6	2.4	2.4	1.8	2.0	1.9	3.0	1.1	3.8	1.5	4.6	2.2	3.3	2.6	2.3	2.3	2.0	1.9	2.1		2.4	
Averages		2.9	2.8	4.3	2.9	2.2	2.2	2.7	2.7	2.6	3.6	4.3	4.3	2.5	3.0	2.7	3.1	2.4	2.7	3.7	2.7	3.0

PM period bus to car journey time ratios

- Journey times by bus are on average **2.4, 2.5 and 3.0 times longer** than travel by car in the AM peak, inter-peak and PM peak.
- Only for travel to / from Edinburgh is the bus a bit more competitive, with travel times by bus being on average **1.6, 1.7 and 2.2** over same time periods.

Fares / Ticketing / Service History / Competition

- Bus **fares** have increased in real terms since the turn of the century and at a faster rate than rail fares and the cost of motoring
- **Ticketing** options can be complex across the region. Most tickets are also only useable on a single operator's services
- The multi-modal and operator OneTicket is not widely used
- Bus routes and operators across the region have been subject to a **high degree of change** over the last 20 years or so
- There is an absence of true **competition between bus operators** across the region and what are essentially local monopolies have developed over time



Relative Cost of Travel (2000 Q1 - 2024 Q1, indexed against 2001 Q1 figures)



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Opportunities

Case for Change

Opportunities (1)

- **Policy environment** which seeks to reduce car kilometres, especially in Edinburgh where a 30% target has been set
- The region is projected to see significant **population growth** - more potential bus passengers and associated revenue
- **Major developments** (e.g., Heartlands, Blindwells, West Edinburgh) provide an opportunity to embed bus travel as the norm for people moving into these developments before car use becomes established and deep rooted
- **Transport (Scotland) Act 2019** provides a range of new powers to local authorities and others to be more active in the planning and delivery of bus services, including:
 - i. the development of Bus Service Improvement Partnerships
 - ii. local transport authorities being permitted to establish their own new municipally owned bus operator
 - iii. the quality contracts process being replaced by a revised Bus Franchising Scheme

Opportunities (2)

- Stakeholder engagement undertaken as part of this work noted an **appetite for increased partnership working** between operators and other stakeholders, including on cross-boundary issues.
- **Under 22s scheme** may promote increased or indeed lifelong bus use habits amongst some in that generation
- More **people are interested in sustainable travel options** - buses can play a role in reducing individual carbon footprints and providing people with alternatives to car ownership
- A range of **new technologies** will provide opportunities to drive innovation and efficiency in the bus sector, including for example in scheduling, ticketing and automation etc.



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Constraints

Case for Change

Constraints

- Primary constraint is around **funding**, and this was confirmed by all stakeholders engaged with as part of this study - real term reduction in local authority spending on subsidised services and increased tender prices mean that the subsidy cost per bus kilometre has also increased.
- Capital spending on bus priority infrastructure via the **BPF** has been paused in 2024/25 - affected the development of a range of schemes across the region and the future of this fund remains uncertain
- The ability of local authorities and other public bodies to act in the bus market is still bound by **competition law**, unless radical measures are adopted
- Much infrastructure funding is currently directed at **active travel** schemes - reallocation of road space to form dedicated cycle tracks can impact on the road space available to general traffic and this can be disadvantageous to the bus
- Some of the **assets** used to deliver bus services are not under council ownership - Edinburgh Bus Station, and not all of the P&R sites around Edinburgh are under council ownership which creates a constraint on maintaining and developing these sites
- Some people **perceive** buses as a less desirable and lower quality mode of transport compared to private cars or trains
- The **Park & Ride sites** around Edinburgh are potentially not in the best locations with the right services to provide a more attractive option than driving into Edinburgh's suburbs and parking near a major bus corridor.

GO SRBS Vision / Objectives

SEStran

Case for Change

South East of Scotland
Transport Partnership

SRBS Vision

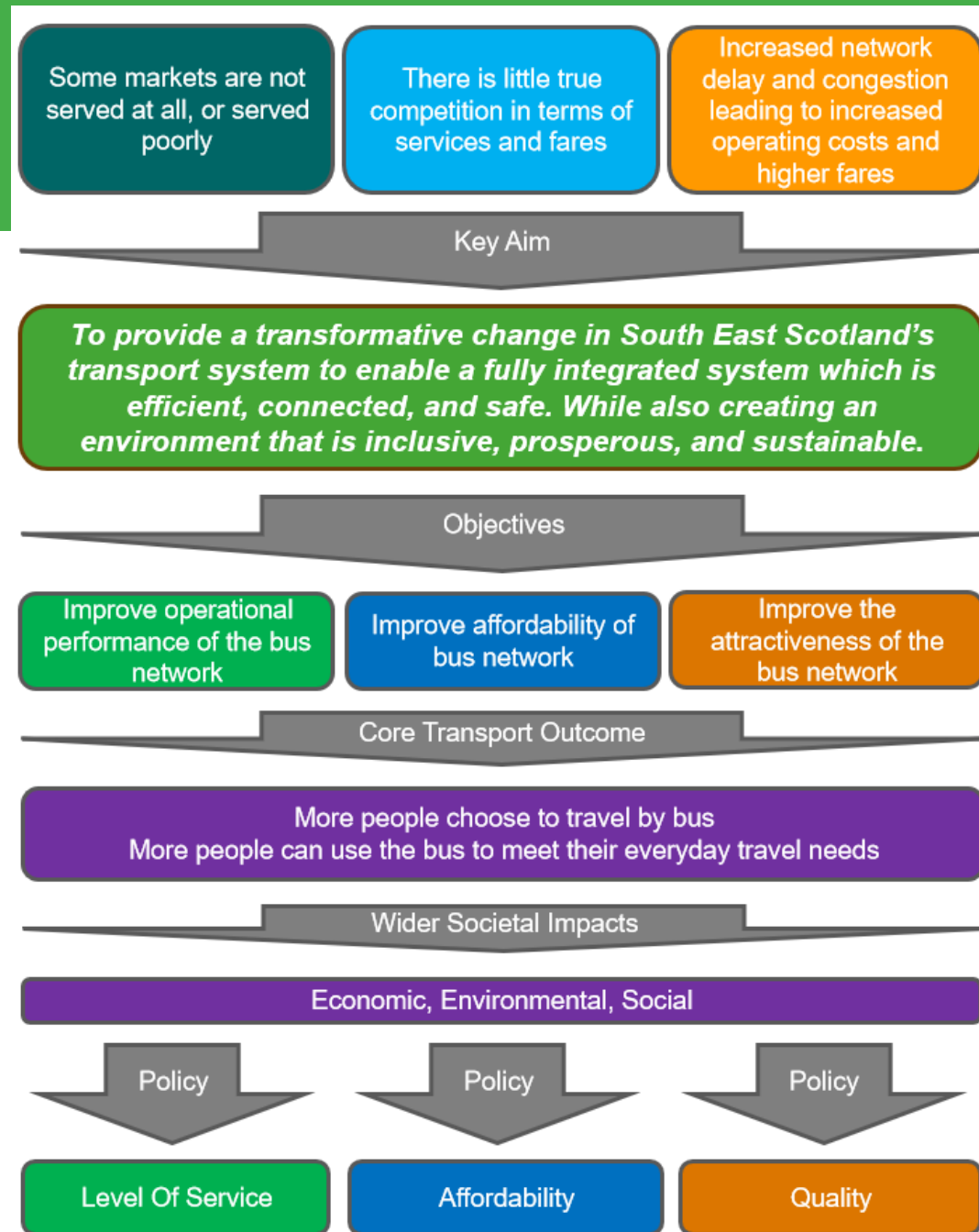
- The problems opportunities and constraints points towards a case for change in the delivery of bus operations (in its widest sense across a range of stakeholders) across the region and overall bus reform to start closing the gap between existing operations and a high-quality bus network
- Any new delivery model would need to provide a more coordinated approach to the provision of a regional bus network, providing more efficient, fast and reliable services, cheaper and simpler fares, an improved passenger experience and a network which is resilient to change
- Given this, the vision for the SRBS has been set:

To provide a high quality bus network for the whole region which is fully integrated with other forms of transport and increases passenger numbers and passenger satisfaction, to support the social, environmental and inclusive economic development of the region

SRBS Vision into strategy objectives

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

- i. Level of Service – this policy area considers how, where and when the bus network operates
- ii. Affordability – the policy will set out ambitions related to the affordability of travel by bus across the region, including factors such as the structure, legibility, and integration of fares
- iii. Service Quality – the policy will focus on the other important aspects that allow the delivery of a high-quality bus service. This includes topic areas, such as interchanges and bus stops, information, ticketing, vehicle and driver standards, and service reliability and punctuality



RECOMMENDATIONS

It is recommended that the Board:

Note the summary of the Case for Change and provide feedback.

Give permission to continue with the next aspects of the strategy development, primarily the development of a draft strategy and corresponding Outline Options Appraisal.

Requests the Partnership Director to continue to engage with the government on reopening the Bus Partnership Fund