SESTRAN PARTNERSHIP BOARD SPECIAL MEETING

Virtual Meeting - Microsoft Teams
10am Friday 28th November 2025

10am PARTNERSHIP BOARD

AGENDA **Page No.**

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2. APOLOGIES
3. DECLARATIONS OF INTEREST

AGENDA A – POINTS FOR DECISION

A1. REGIONAL BUS STRATEGY – Report by Rachael Murphy **2**

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Agendas and papers for all SEStran meetings can be accessed on www.sestran.gov.uk

REGIONAL BUS STRATEGY – BOARD APPROVAL

1. INTRODUCTION

1.1 The purpose of this report is to seek the board's approval for the Regional Bus Strategy (RBS) which is attached as Appendix 1. A summary of the RBS is attached as Appendix 2.

2. BACKGROUND

2.1 The *Towards a World Class Bus Service* paper was presented at the SEStran Partnership Board on June 16, 2023 outlining policy background, the role of buses, ongoing initiatives, and opportunities from the Transport (Scotland) Act 2019. It proposed actions for a world-class service and led to the SEStran Regional Bus Strategy. This triggered development of the SEStran Regional Bus Strategy.

2.2 In June 2024, the initial Case for Change and vision development was presented to SEStran Partnership Board and received approval to continue the strategy. The Case for Change can be found as Appendix 3 to this report.

2.3 In autumn/ winter 2024, local authority officers, operators and a working group from SEStran's Integrated Mobility Forum were invited to a number of sessions to work through the suggested policies and actions thus far developed.

2.4 In December, the board fed back on these, both in the board meeting of 6th December and by sending individual feedback to SEStran officers.

2.5 Having integrated this last round of feedback, the public were invited to give their views in July/ August 2025. The consultation focused on understanding user experience and motivations. We received 5,359 responses throughout the month—an encouraging result that reflects both the effectiveness of our survey structure and communications strategy, and the strong public interest in bus services.

2.6 Once rationalised to consider public opinion, a further draft of the report was shared with local authorities and operators, who were invited to provide any final comments.

3. VISION AND CORE POLICY AREAS OF THE SESTRAN REGIONAL BUS STRATEGY

3.1 Responding to the challenges and opportunities identified in the case for change work, the agreed vision is:

To provide a high-quality, affordable, accessible, and available bus network for the whole region, fully integrated with other transport modes, increasing passenger numbers and satisfaction, and supporting social, environmental, and inclusive economic development.

3.2 To achieve this vision, three key policy areas were identified:

- Improve Level of Service: Enhance where, when, and how the bus network operates, ensuring equitable minimum connectivity by settlement type
- Improve Affordability: Make bus travel more affordable, with simple, integrated ticketing and targeted support for those in transport poverty
- Improve Service Quality: Focus on reliability, information, ticketing, accessibility, safety, and customer experience

4. KEY POLICY AREAS

4.1 Improve Level of Service

Move towards a regionally equitable and guaranteed level of service in terms of connectivity by settlement type. This will need to recognise the resource limitations, topographical challenges, of local authorities, while accounting for the specific needs of communities.

4.2 Improve Affordability

This strategy:

- Seeks to ensure that fares and ticketing are straightforward to understand, easily accessible, and that all users can identify and obtain the best value fare for their journey, regardless of interchanging between services, operators, or modes
- Supports greater consistency of fares and approaches to fare setting across the region
- Supports initiatives to provide free or lower cost bus travel for those in ‘transport poverty’
- Seeks to ensure that concessionary fare schemes are equitable for both operators and eligible passengers, and that resources are targeted and allocated appropriately to ensure measures support is directed where it is most needed
- Seeks to improve the competitiveness of sustainable transport affordability relative to car use and parking fees

4.3 Improve Service Quality

Network Performance and Stability:

- Progress the policies and actions set out in the RTS related to bus priority, road space reallocation, and bus rapid transit to reduce bus journey times and improve bus journey time reliability

- Support a balanced approach to road space reallocation between bus and active travel schemes, as well as an increased role for bus operators in the development of road space reallocation proposals
- Improve the performance of bus services for key regional movements and across the region in relation to reliability and punctuality by enhancing vehicle reliability, vehicle and driver availability, improving the resilience of the bus network, and by prioritising consistent bus journey times
- Support measures to reduce car use to protect and improve bus journey times and reduce journey time variability to deliver an attractive and efficient bus network which promotes passenger growth
- Improve the stability of the bus network by exploring enhanced processes relating to longer-term funding settlements and service guarantees, changes of service, to reduce impact on users, and improve consultation, communication and information-sharing with key stakeholders

Network Identity

- Promote a positive, recognisable, and trusted bus network identity across the region, delivering improved consistency for users in identifying and engaging with information, ticketing, bus stops, interchanges, vehicles, and other key network assets. The strategy recognises that unified branding may not always be practical or necessary, and will prioritise measures that deliver clear benefits to users while acknowledging operational challenges
- Enhance the integration of bus network identity with those of other transport modes to present a cohesive and user-focused public transport system

Ticketing

- Progress the policies and actions set out in the RTS related to integrated ticketing
- Encourage a ticketing system that instils the principles of simplicity, flexibility, value and affordability for users. This should include addressing challenges for cross-boundary and regional movements, alongside a promotion of the same values at a local level.
- Work towards a fully integrated multimodal ticketing system with fair and transparent operator revenue apportionment arrangements.

Information, Customer Service and Feedback

- Progress the policies and actions from the RTS to ensure public transport information is available in a variety of accessible formats, supported by appropriate wayfinding across the network, and making improvements to real time passenger information availability and effectiveness

- Promote a seamless and high-quality user experience for information provision, customer service, and user feedback across all stages of travel, including pre-journey planning, at the bus stop, on-board, and after travel is completed
- Work towards the development of a region-wide Customer Charter in the long term, setting out the standards of service quality that users can expect when using the bus network

Interchanges and Bus Stops

- The Strategy supports greater consistency in the provision of proportionate, high quality, safe and accessible bus stops and interchanges across the region
- The Strategy supports measures to make better use of existing bus-based Park and Ride assets across the region by addressing the root causes of their poor performance. Sites should also be repurposed / relocated if not performing their intended role and contributing to RTS objectives.

Fleet and Depots

- Promote the consistent deployment of high-quality, well-maintained, and appropriate vehicles across all scales of bus operations in the region, including fixed-route services and other delivery models such as Demand Responsive Transport (DRT), community transport, and the wider third sector
- The Strategy supports greater alignment of vehicle accessibility standards with on-street infrastructure standards, to improve accessibility across the regional network.
- Drive the decarbonisation of the bus fleet at all scales of bus operation in the region. This should focus on planning, coordination, and cooperation between bus operators, government authorities, and key stakeholders to address the funding, energy, skills, and broader resource barriers for upgrading fleets, depots, and the provision of wider supporting infrastructure.
- Support mechanisms for vehicle sharing to improve fleet utilisation and service viability across sectors such as health and social care, education, and community transport.
- Improve passenger satisfaction with bus drivers and address barriers to bus usage by promoting a commitment to high-quality standards at a regional level and facilitating the implementation of measures to achieve these standards.

Safety, security and inclusion

- Deliver a bus network that is safe, secure, and inclusive for all users, prioritising the well-being of vulnerable groups and ensuring accessibility for individuals regardless of any disabilities or socio-economic status

- Create a zero-tolerance environment for harassment, discrimination or violence on the bus network, including for both bus passengers and drivers
- Safety by design shall be prioritised and integrated at every stage of the development, maintenance, or enhancement of both new and existing bus services, networks, and facilities

Data and monitoring

- The strategy supports improvements to transport data collection, analysis, sharing, monitoring, and transparency on performance. This will strengthen the use of data and monitoring by key stakeholders and partnerships to improve the performance and quality of the bus network in the region.

5. NEXT STEPS

- Subject to board approval, the regional bus strategy will be shared with a wider audience at the SEStran Summit event on 4th December
- Officers will work with consultants to develop a delivery plan
- "Quick wins" will be included in the 26/27 SEStran Business Plan

6. RECOMMENDATIONS

The board is asked to approve the regional bus strategy for publication

Rachael Murphy
Strategy Manager
28 November 2025

Appendices
1: Draft Bus Strategy
2: Draft Bus Strategy Summary
3: Case for Change Report

Policy Implications	The policy in the Regional Bus Strategy, if approved, will direct SEStran's ongoing activity on bus. The policies are in alignment with our Regional Transport Strategy and the second National Transport Strategy.
Financial Implications	To realise the vision of the strategy, there would need to be significant investment at national level, as well as internal resource of SEStran officer time.
Equalities Implications	The Regional Bus Strategy is accompanied by an EqIA, Fairer Scotland Duty, Child Rights and Welfare. Without this work, there is a risk that a key facilitator of equalities is impinged.

Climate Change Implications	Without improving our public transport offering, we risk increased private car use with an increase in CO2 emissions having corresponding negative impacts on the climate.

DRAFT FINAL DOCUMENT

SESTRAN REGIONAL BUS STRATEGY

IDENTIFICATION TABLE	
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1. FOREWORD

As Chair of SEStran, I am pleased to introduce the Regional Bus Strategy—a vital step in our ongoing commitment to delivering a high-quality, accessible, and sustainable transport network for the South East of Scotland.

The SEStran region is diverse and dynamic, encompassing urban centres, rural communities, and everything in between. Our bus network is central to connecting people with jobs, education, healthcare, and opportunity. Yet, as our region grows and changes, so too must our approach to public transport. The challenges we face—declining bus patronage, affordability, service quality, and the need to decarbonise—are significant, but so too are the opportunities.

This strategy sets out a clear vision: to provide a bus network that is affordable, reliable, and inclusive, supporting the social, economic, and environmental wellbeing of all our communities. It builds on the foundations of our Regional Transport Strategy and reflects the collaborative spirit that defines SEStran's work with our eight local authority partners, operators, and stakeholders.

The Regional Bus Strategy is the result of robust analysis, stakeholder engagement, and a shared ambition to do better for our region. It identifies the actions required to improve service levels, make travel more affordable, and enhance the quality of the passenger experience. It also recognises the importance of innovation—whether in ticketing, information provision, or the transition to zero-emission fleets.

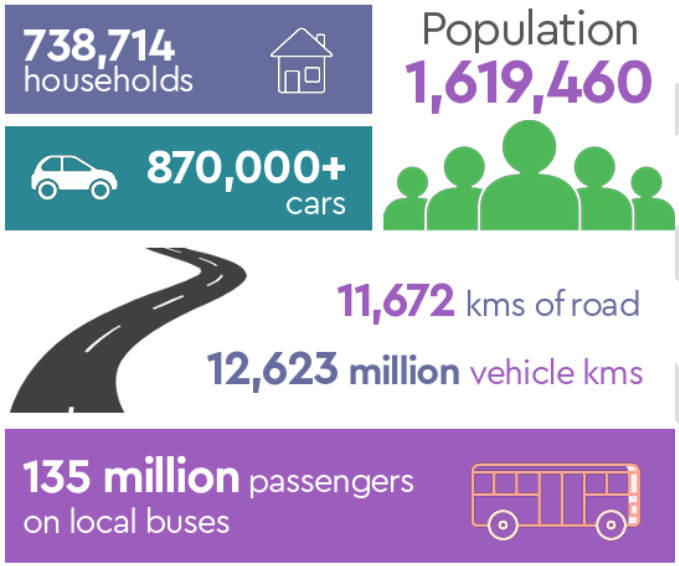
Delivering this strategy will require partnership, investment, and a willingness to embrace change. SEStran stands ready to provide strategic direction and to work with all partners to ensure that the bus network meets the needs of today and tomorrow. Together, we can create a transport system that supports inclusive growth, tackles inequalities, and helps deliver a greener future for the South East of Scotland.

I commend this strategy to all our partners and stakeholders, and look forward to working together to make its vision a reality.

Cllr Sally Pattle, Chair of the SEStran Board

2. ABOUT SESTRAN

SEStran comprises eight local authorities: City of Edinburgh, Clackmannanshire, East Lothian, Falkirk, Fife, Midlothian, Scottish Borders, and West Lothian. The region is a rich tapestry of urban centres and rural communities, with almost a third of Scotland's population living here. This complex environment brings many challenges, especially around the accessibility and availability of transport options, which are not equitable for all areas and demographics. However, it also provides opportunities to boost the numbers of people choosing active travel and to increase the availability of sustainable travel options.



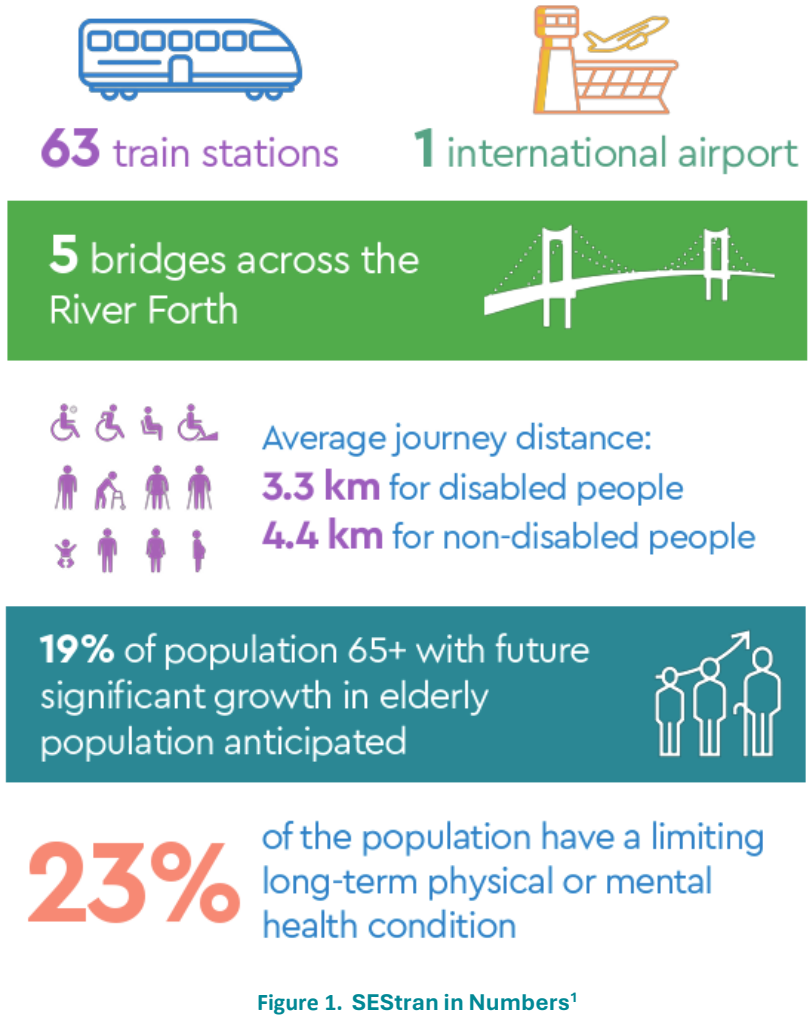


Figure 1. SEStran in Numbers[1]

[1] The SEStran Region In Numbers | April 2025 | SEStran

3. DEVELOPING THE STRATEGY

The SEStran Regional Bus Strategy (SRBS) is a response to the need for to improve bus services across the South East of Scotland. Declining patronage, rising costs, and the demands for more accessible, affordable, and sustainable transport highlight the importance of taking strategic action.

In June 2023, SEStran's Partnership Board reviewed the "Towards a World Class Bus Service" paper, which identified buses as central to regional mobility, especially in areas without rail connections. Major policy documents, such as the National Transport Strategy 2 and the Programme for Government, have underlined the bus network's pivotal role in decarbonisation, social inclusion, and economic recovery—yet the sector faces significant challenges.

The delivery of bus services is taking place within a changing governance landscape. The Transport (Scotland) Act 2019 introduces new and expanded powers for local authorities, including options for direct public operation, franchising, and Bus Service Improvement Partnerships (BSIPs). This opens new opportunities for regional innovation and collaboration between SEStran and its partners.

Building on the SEStran 2035 Regional Transport Strategy (RTS), the SEStran Regional Bus Strategy (SRBS) sets out a clear vision for an inclusive, accessible, and sustainable bus network that effectively connects communities across the region. By establishing the regional direction for future delivery, the SRBS ensures that bus services remain a key component of the region's public transport offer.

June 2024: Initial Case for Change and Vision presented to SEStran Partnership Board; strategy approved to continue.

Autumn/Winter 2024: Workshops held with local authorities, operators, and SEStran Integrated Mobility Forum to discuss draft policies and actions.

December 2024: Strategy reviewed by SEStran Board in meeting and through individual feedback submissions.

Early 2025: Board and stakeholder feedback integrated into revised draft strategy.

July/August 2025: Public consultation conducted to gather views on user experience and motivations; Over 5,000 responses received.

October/November 2025: Consultation responses analysed and draft updated; further draft shared with authorities and operators for final feedback.

December 2025: Final feedback incorporated; strategy launched at the South East of Scotland Transport Summit.

Figure 2. The Timeline for Developing the SRBS

4. SETTING THE SCENE

The SEStran Regional Bus Strategy (SRBS) is founded on the SEStran Regional Transport Strategy (RTS), including its vision, objectives, and policies. The development of these documents is shaped by several key regional trends:

- The SEStran region is experiencing growth, with its population increasing by 7.5% between 2009 and 2019, and a further 6% increase projected by 2035. However, this overall figure hides regional variations; while areas like Midlothian and East Lothian are expected to grow rapidly, areas such as Clackmannanshire and Fife are projected to see declines.
- Car ownership throughout the region continues to rise.
- The region features a diverse settlement pattern, ranging from 'large urban areas' to 'remote rural' communities, creating a variety of challenges for the delivery of public transport – particularly bus services.

Bus services across the region play a crucial role in providing employment, education, healthcare, and leisure opportunities for people regardless of their economic circumstances.

Bus timetable data reveals a high frequency of buses along strategic corridors into Edinburgh and between major population centres. There is also significant bus coverage extending into Midlothian, the west of East Lothian, and between Dundee and St Andrews.

Public transport, especially bus services, plays a central role in addressing poverty, reducing socio-economic and health inequalities, and promoting inclusive economic growth. Many jobseekers and individuals on low incomes depend on public transport to access vital opportunities.

4.1 Challenges and Opportunities

The SRBS 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. It 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. Across the bus network in the region:

- Many regional bus services are Edinburgh-centric, offering greater frequency, better access, and stronger Sunday services, while connections between other local authorities are more limited.
- Some markets are served poorly at certain times of the day or week, or are not served at all.
- There is little true competition in terms of services and fares in many parts of the region.
- Network delays and congestion are reducing the attractiveness of the bus network, eroding passenger confidence and negatively impacting perceptions of bus travel.

These issues are widening the gap between the current bus network and the RTS vision for a high-quality service, as reflected in declining passenger numbers and satisfaction levels (69% in 2019 to 62% in 2022). For passengers, the current bus network means:

- Users often perceive ticketing complicated and expensive, with few options for convenient integration between operators and modes.

- Most routes are operated on a commercial basis, which results in some areas being better served than others. However, expanding services can create significant social, economic, and environmental benefits, justifying supply levels beyond what the market alone would provide.
- Customer satisfaction varies depending on the operator.
- Instability – such as cutbacks, long journey times, changing routes, and poor service reliability – has led to a loss of confidence in bus travel in some areas.
- There is some competition, rather than integration, between public transport modes and other sustainable travel options.

Community Transport and Demand Responsive Transport (DRT) services present opportunities to support people who are isolated or unable to use mainstream public transport. However, the development of these services is currently limited by high per-passenger costs and insufficient technological support.

4.2 The SRBS Vision and Core Policy Areas

The identified problems and opportunities clearly demonstrate the case for change in the delivery of regional bus operations, as well as broader reforms, to begin bridging the gap between the current network and a high-quality network for the whole region. Any new approach should deliver a more coordinated regional bus network – offering faster, more reliable services; simpler, more affordable fares; a better passenger experience; and the resilience to adapt to change.

Given this, the **Vision for the SRBS** is:

To provide a high quality, affordable, accessible and available 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 is underpinned by three core policy areas, each focused on improving regional and cross-boundary connectivity and ensuring that more people can rely on buses to meet their daily needs:

- **Improve Level of Service**: Defining where, when, and how the bus network operates. For this regional level strategy, this consists of network principles around connectivity, setting out connectivity standards based on types of settlement.
- **Improve Affordability**: Setting out ambitions to make bus travel more affordable throughout the region.
- **Improve Service Quality**: Focusing on the other important aspects that help the SEStran region move towards a high-quality bus service. This includes topic areas such as information, ticketing, accessibility and network performance.

The subsequent sections of the Strategy will explain why each policy area is important, describe the current situation in the SEStran area, illustrate what a high-quality bus network could look like, and identify the key policies and focus areas needed to achieve improvements.

5. CORE POLICY AREA: IMPROVE LEVEL OF SERVICE

5.1 Why is improving the level of service important, and what is the situation in the South-East of Scotland?

National, regional, and local policy has a strong focus enabling travel without the need for a car and the need to reduce overall car use, in part by encouraging a shift towards public transport.

This is important for addressing issues such as affordable access to employment and training, and for supporting net zero ambitions as the population and economy of South-East Scotland continue to grow.

The SRBS Case for Change report highlighted several challenges regarding the level of service provided by the bus network:

- **Across the region, bus ridership fell by 11% in the decade prior to the pandemic,** and by 2022-23, was only 88% of COVID-19 pre-pandemic levels, despite the introduction of free bus travel for under-22s. This decline mirrors a broader trend at the national level.[2]
- Over the past decade and beyond, **there has been a sustained decline in bus passenger numbers** compared to road traffic and rail usage, with rail especially seeing significant growth prior to the COVID-19 pandemic. [2]
- The **supply of bus services**, measured in vehicle kilometres, **has also declined since peaking in 2007-08**.
- However, **these trends vary markedly across the region,** with some local authorities seeing much lower levels of bus use and steeper declines in bus use than others. Notably, Edinburgh was found to have a buoyant bus network, in terms of use and service provision, relative to the rest of the region.

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.

5.2 Insights for Level of Service from Our Strategy Survey

Our Public Survey for the SRBS

To inform the development of the SRBS, a public survey was conducted across South East Scotland's eight local authority areas. Over four weeks, more than 5,000 people aged 16 and over shared their views on barriers to bus use, priorities for improvement, and ways to make services more accessible and inclusive. This input has helped shape the strategy to promote a bus network that better meets local needs, supports sustainable mobility, and addresses inequalities in transport provision across the region.

[2] Scottish Transport Statistics 2023 | Transport Scotland

Main Barriers to Bus Use:

- Insufficient Frequency: 59% report that buses do not run often enough, making this the most common reason for avoiding or being unable to complete a journey.
- Indirect Routes: 56% say that routes are not direct enough, requiring lengthy or multiple changes.
- Limited Operating Times: Over half (51%) note that buses do not run at the times needed (such as evenings, early mornings, or Sundays).
- Poor Integration & Slow Journeys: 38% cite poor connections with other buses or modes, and 25% see buses as slower than driving.
- Service Absence: 11% have no bus service at all where they live or need to go.
- Other Factors: Issues include stops being too far away, lack of comfort/seating, overcrowding, lost or cut routes, poor accessibility, safety concerns, unreliable information, high fares, and preference for other transport.

Frequency and Impact of Barriers:

- Half of respondents encounter these barriers more than half the time they attempt to use buses.
    - 21%: nearly every time
    - 29%: more than half the time
    - 20%: less than half the time
    - Just 8% never experience these issues

Demand for Service Improvements:

- 66% say they would use buses "much more" if these issues were resolved, with another 24% saying they would use them "a little more".
- Only 4% expect no impact from improvements.

Key Open-Ended Question Insights:

- Reliability: Cancellations, lateness, and "ghost buses" are recurring problems.
- Convenience: Many see buses as too slow, indirect, or poorly integrated with other modes.
- Comfort/Capacity: Overcrowding and lack of space for buggies, wheelchairs, or bikes limit usability.
- Accessibility: Physical barriers, limited stops, difficult access, and lack of provision for those with mobility issues are major issues.
- Safety/Environment: Concerns over anti-social behaviour, poorly maintained stops and buses, and lack of personal safety deter use.
- Affordability: High and complex fares, often exceeding car costs, are a major deterrent—particularly without integrated ticketing.
- Information: Poor real-time information, unclear communication about disruptions, and lack of journey planning details create hassle and uncertainty.
    - Other modes: Many prefer to drive, walk, cycle, or take the train due to convenience and reliability.

In summary, service frequency, directness, and operating times are the main barriers deterring bus use in the region, compounded by issues with reliability, integration, affordability, comfort, and

information. Nearly half of travellers face these challenges frequently, but there is significant willingness to switch to bus use if these core issues are addressed—highlighting a major opportunity for growth through targeted service improvements.

5.3 What does a high-quality level of service look like?

The foundation of any bus network is the ability for people to conveniently make trips for a range of purposes, supported by comprehensive coverage across different areas and times of day and week. Once this basic connectivity is in place, other factors – such as journey comfort, reliability, and journey time – add further value.

At the regional level, a high-quality level of service – aligned with the vision of this strategy – would aim to provide residents of different types of settlements with a core level of connectivity. This would enable them to undertake a broad range of day-to-day activities, with the extent and type of connectivity proportionate to the size and needs of their community.

5.4 What is the focus of this Strategy?

The SRBS seeks to tackle these aspects of decline, in part, by addressing the supply side of bus service decline – setting out network principles to ensure that bus services are delivered where, when, and how often they are needed – and enabling more users to travel by bus.

The SRBS Case for Change identified specific elements related to level of service that need to be addressed, including:

- Many regional bus services across the region are Edinburgh-focused and **options for bus for travel between local authorities outside of Edinburgh are more limited**. This is despite the fact that the Regional Transport Strategies' Case for Change demonstrated that the majority of car movements in the region do not include the city. 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 concentrated around key urban areas and high-volume corridors, with **a number of essential rural services currently subsidised**. These subsidised services are increasingly at risk due to rising tender prices and real-terms reductions in council budgets and the National Support Grant,[3] resulting in many smaller rural communities lacking scheduled bus services. This, in turn, creates cost in health, social care, and a loss of employment and education opportunity.
- **Local authorities have no control over the commercially provided network**.
- Analysis of access by bus across the region highlighted that:
    - **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

[3] The standard NSG rate had been held at 14.4p since 2022 at the time of writing.

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 potential 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 subsequent increased car use.
- **Travel times by bus** are usually long and are generally far longer than by car, and this issue is worsened by congestion.
    - 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 reasonably 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.[4] 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.
- There are 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

[4] Analysed using Google API data.

job market.[5] Improved public transport connectivity must be one element of addressing this deprivation and improving **equality of opportunity** across the region.

Our public survey reinforced these findings, with nearly 60% of respondents highlighting insufficient frequency, 56% reporting routes not being direct enough, and over a third citing unavailable or inaccessible services at certain times—such as evenings, weekends, and in rural or outlying areas. There was also clear feedback that recent timetable reductions and loss of direct routes have pushed passengers away from using the bus. This is especially problematic for those without alternative means of transport.

Looking to the future, without intervention there is a risk that:

- Bus networks in some areas may be withdrawn from certain communities or become less frequent in others. Projecting current trends forward would suggest that reduced bus kilometres could disproportionately affect less densely populated areas and those distant from key routes between larger settlements and major destinations. This could increase regional inequity and transport poverty for affected populations, limiting their access to essential services, employment, and education.
- As networks shrink, regional connectivity may suffer, particularly for those needing to transfer to regional services. This could reduce access to important destinations and widen social disparities between well-connected areas and those lacking adequate bus services.
- Reductions in the bus network could perpetuate a cycle of decline, encouraging car use and exacerbating issues such as traffic congestion and negative environmental impacts. This situation could worsen if poor travel habits become entrenched in new developments.
- Ultimately, some networks may shrink to such an extent that they simply cannot sustain the local overheads associated with their provision (e.g. local bus depots) resulting in their complete abandonment, as was experienced in West Lothian in 2023.

The RBS expands on the policies and actions set out in SEStran's RTS related to improving levels of service on the bus network and ensuring that bus services are available where needed (see Appendix A). The RTS policies and actions concentrate on the following efforts:

- Target service improvements in locations most at risk of a combination of transport poverty and deprivation, for the betterment of access to healthcare facilities, and connection to essential services.
- Retain a core network of rural bus services wherever practical and feasible within available resource and demand constraints.
- Introduce direct and express services to connect settlements across the region that currently require multiple transfers or have excessively long journey times.
- Implement DRT in areas where traditional scheduled bus services are not feasible, particularly in rural and remote locations.

[5] 2035 Regional Transport Strategy | SEStran

- Develop shared mobility solutions to provide broader access to various transport options without requiring ownership. While ambitions for shared mobility services set out in the RTS mostly relate to car and bicycle sharing schemes, the RBS expands this definition to include community-led initiatives involving bus and mini-bus services.

At present, bus services across the SEStran region are primarily provided commercially with supported services infilling in some places and at some times where commercial services are not provided. This largely market-driven approach means there is an inconsistency of provision across the region, and this was demonstrated in the Case for Change. The RBS will focus on addressing this issue by moving towards an equitable minimum level of service in terms of connectivity by settlement type. Any level of service would require significant national investment, both in finance and resource to local authorities, and would be complimentary of local specificities like road infrastructure and knowledge of communities' needs and wants.

Survey respondents echo the need for more meaningful engagement in route/service decisions, calling for consistent region-wide service standards, transparent accountability, and the inclusion of more direct community input in determining service needs.

5.5 SRBS Policy to Improve Level of Service

The following policy has been developed under the **Improve Level of Service** core policy area for the SRBS:

- Move towards a regionally equitable level of service in terms of connectivity by settlement type, including travel between key towns in near-neighbour local authorities. This will need to recognise the resource limitations of local authorities, while accounting for the specific needs of communities.

Moving towards a regionally equitable level of service in terms of connectivity by settlement type would:

- Provide improved life opportunities for those without access to a car.
- Provide more opportunities for people to use public transport and reduce car use, contributing to a range of policy aims from national to local level.

In the main, buses provide connections for residents from smaller settlements to larger settlements to access a wider range of day-to-day and more occasional services and opportunities. As the size of a settlement reduces, both the level and the type of connectivity which can reasonably be expected will change, with alternatives such as DRT and community transport increasingly appropriate for providing connections where scheduled bus services may not be viable.

The Concept of Providing a Regionally Equitable Level of Service

This section presents examples to clarify how the concept of regionally equitable levels of service could be applied across various settlement types in the SEStran region. These examples help illustrate the kind of minimum connectivity that might be expected under defined service standards, while recognising that actual service provision would need to be determined through further investigation and regularly reviewed and adapted to reflect evolving travel patterns, community needs, and the resources available to operate services. It is also recognised that geographical constraints and low population density can make it especially challenging to provide conventional bus services in some areas, and flexible solutions may be required.

For inter-urban connectivity, three main types of connectivity have been defined here:

- Part day – allows a resident to get to a bigger place for say 2-3 hours and conveniently return in the course of a working day.
- Working day - allows a resident to get to a bigger place by 0830 and return after say 1730, i.e., to permit a ‘regular’ working day (9 hours).
- Full day – would allow an earlier arrival and later departure from the bigger place across say 16 hours (0630 first arrival – 2200 last departure).

This level of connectivity may differ on a weekday, Saturday and Sunday but should remain under regular review as travel patterns shift.

The Scottish Government defines the following settlement types:

- Large urban - >125k population
- Other urban – 10k to 125k population

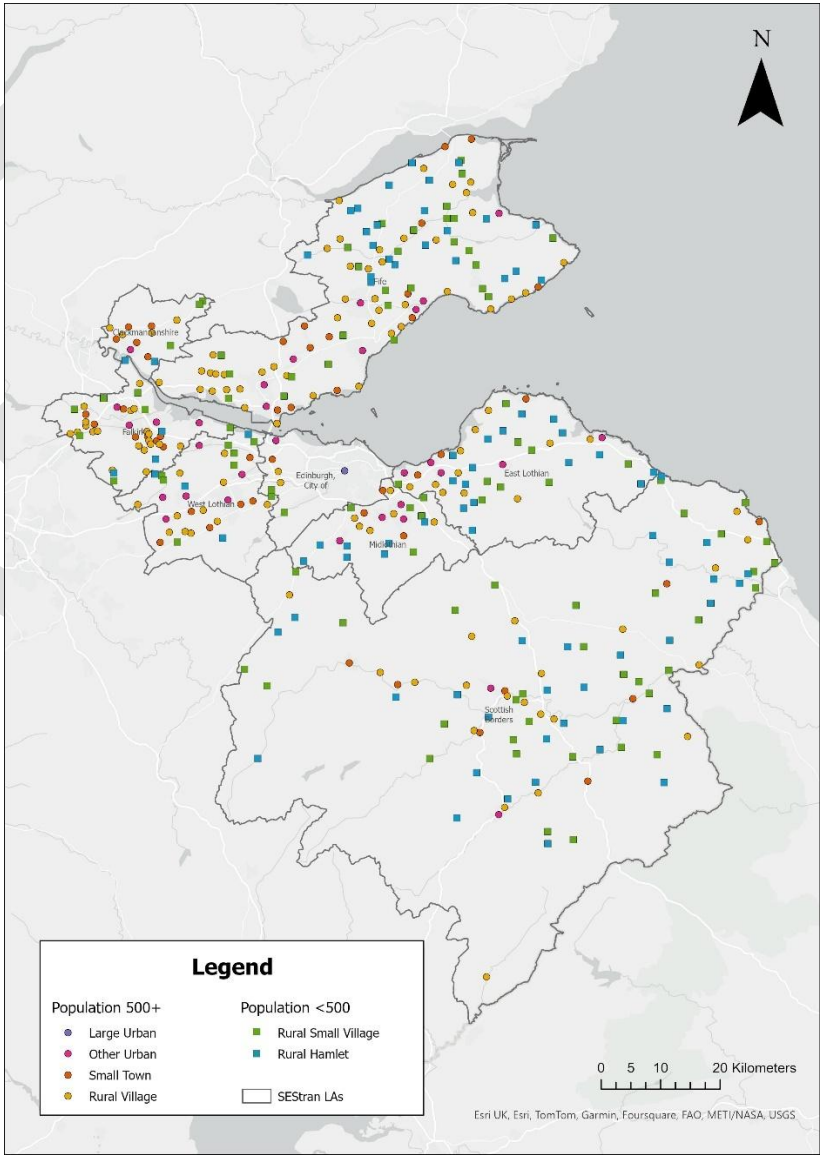
- Small town – 3k to 10k population
- Rural (defined here as *Rural village*) – 500 to 3,000 population

To provide further disaggregation, we have further defined:

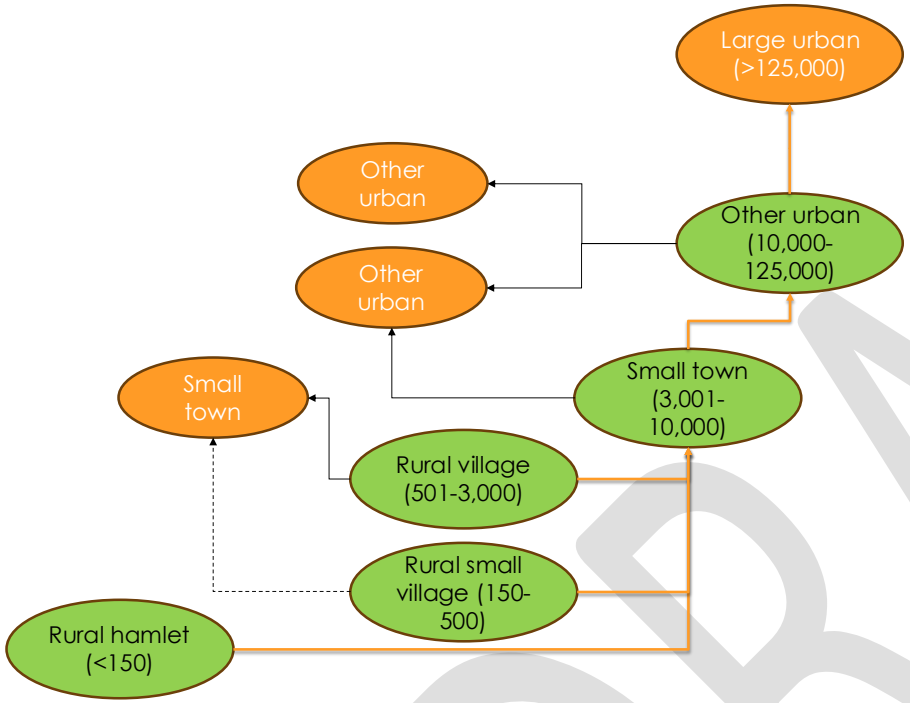
- Rural small village – 150 to 500 population (estimated from OS built up areas)
- Rural hamlet - <150 people (estimated from OS built up areas)

The underlying rationale would be that, through a hierarchical approach, rural areas should at least connect directly to small towns, small towns directly to other urban areas and urban areas directly to large urban areas.

The figure opposite shows SEStran region settlements using the above definition.



The principles around the levels of connectivity are based on the following hierarchy:



- Rural hamlets would connect to at least one small town.
- Rural small villages would connect to two small towns, one of which provides a working day -alternatively, a connection to a single 'other urban' or 'large urban' centre would also be sufficient.
- Rural villages would connect to two small towns – alternatively, a connection to a single 'other urban' or 'large urban' centre would also be sufficient.
- Small towns would have connections to two other urban areas – alternatively, a connection to a single 'large urban' centre would also be sufficient.
- Other urban areas would have connections to two other urban areas and one large urban area – direct connections would also be provided to the largest settlements in neighbouring and near neighbouring local authorities - e.g., Dalkeith-Livingston, Alloa-Falkirk.
- Where intra-urban connectivity is not adequately provided by inter-urban buses, larger small towns and other urban areas would have internal bus connections.
- Within large urban areas, key city arterial and orbital corridors would be served on a 'turn up and go' basis throughout the core operating day.

The next table shows an example of how connectivity standards could be organised based on the settlement and connectivity types outlined above.

In addition, it indicates that this basic connectivity criterion could be supplemented by service frequency standards for settlements classed as 'small towns' or greater. This means that for smaller communities, getting to a small town guarantees a certain level of onward connectivity and service frequency. The levels of service would need to be evaluated regularly to ensure they align with actual uptake and demand from users, while funding arrangements would need to be secured on a multi-year basis to support the long-term viability and stability of the bus network. There may be cases in which connecting to the network at an interchange point, such as a Park and Ride, is a more attractive and efficient model for both the user and the operator.

Table 1. Connectivity Principles Example

Settlement type		Rural Hamlet	Rural Small Village	Rural village	Small town	Other Urban	
Population		<150	150-500	500-3,000	3.000-10,000	>10,000	
# Minimum Direct Public Transport Connections		1 * Small Town	2 * Small Towns	2 * Small Towns	2 * Other Urban	1 * Large Urban	2 * Other Urban
Defined service frequency standards		-	-	-	✓	✓	✓
Monday-Friday (each day)	**Part**	✓	✓	✓	✓	✓	✓
	Working	-	✓(to 1)	✓	✓	✓	✓
	Full	-	-	✓	✓	✓	✓
Saturday	**Part**	✓	✓	✓	✓	✓	✓
	Working	-	-	-	✓	✓	✓
	Full	-	-	-	✓	✓	✓
Sunday	**Part**	-	-	✓	✓	✓	✓
	Working	-	-	-	✓	✓	✓
	Full	-	-	-	-	✓	-

By these criteria, connectivity does vary markedly across the region. Some examples are set out below; these reflect the bus network at the time of writing.

Examples of **rural hamlets** include:

- There are many examples without scheduled bus connections, including Howgate in Midlothian, Humbie in East Lothian (served by DRT), Ettrickbridge in the Scottish Borders (service on Tuesdays only).
- Blyth Bridge in the Scottish Borders does meet the criteria though by providing part-day connectivity to Peebles (a small town) 6-days per week.

Examples of **rural small villages** include:

- East Saltoun in East Lothian has part-day (Mon-Sat) and working day (Mon-Fri) connectivity to Haddington (other urban) and no Sunday service.
- Ednam in the Scottish Borders has a service which part-day connectivity to a small town, Kelso 6-days per week.

Examples of **rural villages** include:

- Avonbridge in Falkirk District has part-day and working-day connections to Falkirk (other urban) Mon-Sat but no connection on a Sunday. It also has a part-day connection to Whitburn (other urban). No full-day connections.
- Stoneyburn in West Lothian has a full-day bus service to Livingston (other urban) Monday to Saturday, and a working day service on Sundays, meeting the full-day criteria for most of the week.

Examples of **small towns** include:

- Burntisland in Fife has near full-day connectivity (7 days) to Dunfermline (other urban), Leven (other urban), and Kirkcaldy (other urban)
- Stenhousemuir in Falkirk District has 7-day part-day and working day connections to 'other urban' settlements Larbert, Falkirk, Grangemouth and Bo'ness, but no full-day connectivity.
- Blackburn in West Lothian has a full-day service to Livingston Monday to Saturday, and a better-than-working-day service on Sundays. To Bathgate, Blackburn has a full-day service Monday to Saturday and a working day service on Sundays.

Almost all **other urban** settlements do have direct connectivity to Edinburgh (large urban) with the exception of Alloa.

- Hawick in the Scottish Borders has part and working day connection to Edinburgh (large urban), full-day connectivity (Mon-Sat) to Selkirk and Galashiels (other urban)
- Whitburn in West Lothian has 7-day full-day connectivity to Edinburgh (large urban), Bathgate and Armadale, meeting the criteria in full.

In applying these connectivity standards, the mode of provision may vary by local context. While regular scheduled bus services may remain appropriate for larger settlements and corridors, **flexible options such as DRT should be considered, particularly in areas with lower population densities or less predictable travel demand**. DRT can help ensure smaller communities and rural areas maintain access to key towns and onward transport networks.

5.6 Actions to Deliver the Policies

- **Carry out a detailed audit of connectivity against a set of core equitable service standards for settlements in the region, and some settlements in neighbouring Regional Transport Partnerships.** Following this, review the feasibility of potential standards and develop a prioritised programme of improvements, considering factors such as Scottish Index of Multiple Deprivation (SIMD). Service standards will take account of flexible and DRT models, recognising that DRT may be the most effective means of delivering core service levels in rural or low-demand areas, in addition to considering rail service provision.
- **Informed by the audit and review, engage on the potential implementation of core equitable service standards** for intra-SEStran, inter-urban, and cross-boundary connectivity, including important movements outside of the RTP area.

6. CORE POLICY AREA: IMPROVE AFFORDABILITY

6.1 Why is affordability of travel by bus important, and what is the situation in the South-East of Scotland?

Making bus use affordable is key to enhancing the public transport offering in the region and the promotion of sustainable travel. It is particularly important for:

- **Enhancing Accessibility:** Ensuring that public transport is available to all, including those on lower incomes, with disabilities, or with limited access to technology. In Scotland, people on lower incomes are more likely to use buses than those on higher incomes and often have less access to best-value tickets, such as weekly or monthly passes.[6] Similarly, those without access to certain technologies, such as smart phones, or that are not confident using these technologies may not have access to all fare options.
- **Reducing Inequalities and Deprivation:** Ensuring that everyone can participate fully in society without relying on car ownership, thereby securing access to employment, education, training, and healthcare. In many situations, bus services are a more cost-effective means of providing widespread public transport access than rail, meaning that bus is a critical mode for socially equitable use of public money, helping give deprived households improved life opportunities.
- **Increasing Bus Patronage:** Creating a positive feedback loop where increased bus usage leads to enhanced bus service supply and better access to bus services.
- **Supporting Economic Growth:** Ensuring that unaffordable transport costs do not distort access to the labour market.
- **Reducing Environmental Impact:** Breaking reliance on car to combat the climate emergency and improve air quality.[7]

The SRBS Case for Change highlighted that the cost of bus travel is a significant issue for some people in the region, restricting their travel options and life opportunities. In recent years, **bus travel costs have increased more than other modes of transport**, and bus operating costs have also risen, with fares varying across the region.[8]

Customers in the SEStran region have differing views of whether bus fares are good value. 83% and 86% of regular bus passengers in Midlothian and West Lothian, respectively, agree that they are. However, in the Scottish Borders and Falkirk, the figures drop to 40% and 45%, respectively.[9]

Data from the Young Persons' Free Bus Travel Scheme, covering its inception in January 2022 until April 2023, shows significant variation in uptake across the SEStran region. Edinburgh has the highest uptake

[6] In Scotland, 51% of households with incomes up to £10,000 p.a. used the bus in the past week, compared with 27% of those with household incomes over £50,000 p.a.

[7] Fair Fares Review | Transport Scotland

[8] Scottish Transport Statistics 2023 | Transport Scotland

[9] 2022 Scottish Household Survey, asked 2021 | Scottish Government

in Scotland at 83%, well above the national average of 59%. In contrast, Falkirk and Clackmannanshire have the lowest uptake in Scotland at 41%.[10] This may be further exacerbating socio-economic inequalities that are already more prevalent in Falkirk and Clackmannanshire.

Improving access to this free bus travel scheme is crucial for making bus services more affordable for young people. These disparities in uptake are concerning and suggest barriers in certain areas. Use of buses is, of course, directly affected by the availability of suitable services – free travel has no value if there is only limited availability of services. These barriers may be related to the extent and quality of the bus network, as well as factors such as the application process, awareness, or other challenges.

6.2 Insights for Affordability from Our Strategy Survey

Affordability remains a critical factor in bus use and access across the South East of Scotland. Survey findings indicate that while a majority of respondents (74.8%) have not avoided buses due to cost, a sizeable minority face financial barriers: 15.0% sometimes avoid using the bus because of expense, and 8.3% do so often.

Regarding improvements, respondents clearly prioritise simpler and fairer fare structures:

- 35.7% want no extra charge for switching buses on a journey.
- 33.1% favour straightforward fare systems, such as single-zone prices.
- 32.1% support automatic best-value pricing to avoid overpaying.
- 28.3% want affordable or free connections with other public transport.
- 21.7% value discounts for young people, seniors, and low-income groups. Still, over a quarter (26.6%) felt none of the suggestions would resolve affordability barriers, indicating deeper, more systemic challenges.

Open feedback also highlights several themes:

- Free or Discounted Passes: Many respondents currently benefit from concessionary passes, reducing concern about fares for these groups but generating demand for wider cross-network applicability.
- Price Structure Issues: High fares, especially for short or cross-zone journeys, and the need to buy multiple tickets across operators are major sticking points. There is strong interest in benchmarking local fares against more integrated systems elsewhere in the UK and Europe.
- Integrated Ticketing: Desire for tickets valid across different operators and modes, daily/weekly capping, and simpler, more transparent pricing systems.

[10] Year 1 Evaluation of Young Persons Free Bus Travel Scheme | Transport Scotland

- Service Coverage and Reliability: Affordability concerns are frequently linked with limited or unreliable service, especially in rural areas.
- Social Measures: Robust support for targeted discounts, proposals for universal free travel (funded by taxation), and group ticketing options.
- Accessibility & Ease of Payment: Emphasis on easy ways to buy tickets, group/employer schemes, and inclusive design for all mobility needs.

A minority expressed high satisfaction with current pricing and services, noting examples of good value and reliability.

Overall, the results underscore the need for simpler, more integrated, and competitively priced bus fares, alongside targeted social policies and reliable, accessible services. Tackling these areas has the potential to remove affordability barriers and make bus travel a more viable option for a broader segment of the population.

6.3 What does a more affordable bus network look like?

Best practices indicate that the most affordable bus networks are characterised by the following features:

- Fares and ticketing options that automatically apply the 'best value' for the user, such as weekly auto-capping, thus limiting financial obligations to pay up front.
- No financial disadvantage for users who travel using multiple transport operators or modes, and ensuring bus travel is competitive with the cost of car travel and parking.
- Fares that are managed in relation to local socio-economic conditions, ensuring that distance-based fare structures do not penalise those living in lower-income areas. People on lower incomes may not be able to afford to live near their travel destinations or in areas with a range of travel options.
- Reduced fares or free travel for those who cannot otherwise afford to use bus services, in turn increasing access to employment opportunities.

Fair Fares Review

Looking to national research, Transport Scotland recently published the 'Fair Fares Review,' which outlines recommendations and plans to create an affordable and accessible public transport system. The review includes both short-term and medium to long-term recommendations to achieve this goal. [11]

Short-term actions for bus include developing a proposal for:

- A *flat fares bus pilot* – an area-based scheme to provide flat fares on bus travel, or reduced fares on zonal integrated travel.

Medium to long-term plans include:

- Governance changes.

[11] Fair Fares Review | Transport Scotland

- Introducing national and/or regional integrated ticketing and fares structures.
- Tackling the high relative cost of public transport.
- Improving stability of the bus network.
- Maintaining the National Concessionary Travel Schemes, including exploring options for a national bus or multimodal travel scheme and fare structure to encourage more people to use buses and the wider public transport system, particularly for commuting.

A notable precedent for the flat fares bus pilot is the Department for Transport's (DfT) national scheme in England, which initially capped the maximum single bus fare at £2, later raised to £3 in 2025. The aims were to improve affordability, mitigate cost-of-living pressures, and encourage greater public transport use. An evaluation of the scheme's first 10 months found: [12]

- The £2 Bus Fare Cap increased bus use by both attracting new passengers and encouraging a modal shift from private vehicles, particularly cars and vans.
- The scheme's impact was greatest among younger people (aged 16–24), urban residents, and frequent bus users, who also reported the largest fare savings—ranging from 67% to 73%.
- Across England (outside London), bus patronage rose by an estimated 13% between January and October 2023. Of this, around 5% increase was directly attributable to the fare cap.

Since demand is generally sensitive to price changes, increasing to a £3 fare is likely to have an impact on demand.

6.4 What is the focus for this Strategy?

The RBS adds to the relevant policies and actions from the RTS (see Appendix A), which states that '*the public transport system should be affordable for all, based on their ability to pay*', with an action to '*resist pressures to increase public transport fares and explore opportunities to provide more affordable public transport for those least able to pay for it*'.

The Strategy focuses on improving bus travel affordability across the region, with particular attention to the challenges faced on regionally important journeys. Key areas include:

- Helping to ensure that regionally important movements are viable and attractive for travel by bus in terms of affordability. The strategy will address the complex and variable fare structures across the region to make it easier for users to access the most affordable fares. This includes identifying and resolving issues where travel requires multiple operators and modes, and where fares structures disproportionately affect users, particularly those less able to afford travel by bus.
- Assisting those eligible for free or reduced bus fares in accessing their entitlements. This involves identifying barriers to the uptake of

[12] Evaluation of the first 10 months of the £2 Bus Fare Cap | DfT, Frontier Economics and SYSTRA, 7th May 2025

cheaper fares and the National Entitlement Card in the region and addressing these barriers, such as through awareness campaigns.

- Making the improvement of bus travel affordability a central objective in bus service enhancements funded by the government.

Feedback from the SEStran RBS Public Survey affirms the need for these actions. Respondents clearly prioritise simple and fair fare structures, automatic best-value pricing, discounted options for specific groups, and easy access to ticket purchase and information as essential for improving affordability.

6.5 SRBS Policies to Improve Affordability

The following policies have been developed under the **Improve Affordability** core policy area:

- Fares and ticketing should be straightforward to understand, easily accessible, and ensure all users can identify and obtain the best value fare for their journey, regardless of interchanging between services, operators, or modes.
- The Strategy supports greater consistency of fares and approaches to fares setting across the region.
- The Strategy supports initiatives to provide free or lower cost bus travel for those in 'transport poverty'.
- Ensure that concessionary fare schemes are equitable for both operators and eligible passengers, and that resources are targeted and allocated appropriately to ensure support is directed where it is most needed.
- The Strategy supports measures to improve the competitiveness of sustainable transport affordability relative to car use and parking fees.

These policies are underscored by the SEStran RBS Public Survey findings, which show significant demand for integrated, capped, and transparent ticketing systems, as well as genuinely affordable options for those currently at risk of transport poverty. Addressing systemic fare confusion, the costs of interchanging, and providing clear information and accessible purchase methods are seen as important by the public.

6.6 Actions to Deliver the Policies

The following actions have been developed to support the delivery these policies:

- **Conduct a feasibility study and readiness assessment for a bus flat fares pilot**. This study will outline the potential scope, benefits, challenges, costs, key stakeholders, and delivery partners for the pilot scheme.
- **Champion NSG reform** to meet inflationary pressures on bus operations, thus supporting bus services.
- **Establish a working group with key stakeholders to undertake a regional fares review** – or take part in national efforts – to develop integrated ticketing and pricing solutions for more affordable and equitable journeys – especially for key strategic movements across the SEStran region. This collaborative work will seek to:
  - Identify problem areas where users face difficulties accessing affordable bus fares, including comparing bus and car travel costs.

  - Develop multi-operator, multi-modal, and multi-area fare options that offer 'best value' and do not penalise users who interchange.
  - Advance smart ticketing solutions, such as auto-capping contactless payments and account-based ticketing, in line with Transport Scotland's Smart, Digital, Integrated Ticketing and Payments Delivery Strategy and the Fair Fares Review.
  - Promote greater regional consistency and equity in fare structures.
  - Consider a partnership approach to limit price increases over a specified period (e.g. once a year) and align them with an appropriate control metric (e.g. operating costs or inflation).
- **Lobby Transport Scotland to identify barriers to the uptake** of National Entitlement Cards and best value bus fare options, particularly among young people. Explore ways to improve access to these options for those who need them most.
- **Advocate to the Scottish and UK Governments for fiscal policies that rebalance the cost of travel** in favour of sustainable and public transport options, thereby supporting the competitiveness of bus services.

7. CORE POLICY AREA: IMPROVE SERVICE QUALITY

The SRBS Case for Change highlights the urgent need to enhance the quality and consistency of the bus network in the SEStran region to make bus travel more appealing to potential users. This necessity is underscored by declining passenger numbers and decreasing satisfaction levels in some parts of the region:

- According to the Scottish Household Survey, satisfaction with public transport (averaged across SEStran local authorities) declined in the decade before the pandemic and has worsened since.
- Satisfaction levels vary significantly across the region, with the percentage of those 'very satisfied' or 'fairly satisfied' ranging from around 85% in the City of Edinburgh to less than 40% in Falkirk.
- Satisfaction with different aspects of bus services also varies widely across the region.

Figure 3 presents key elements for improving the quality of the bus network in the region. These elements are crucial for both potential bus users and the stakeholders involved in delivering successful services, such as bus operators, government authorities, and access and mobility groups.

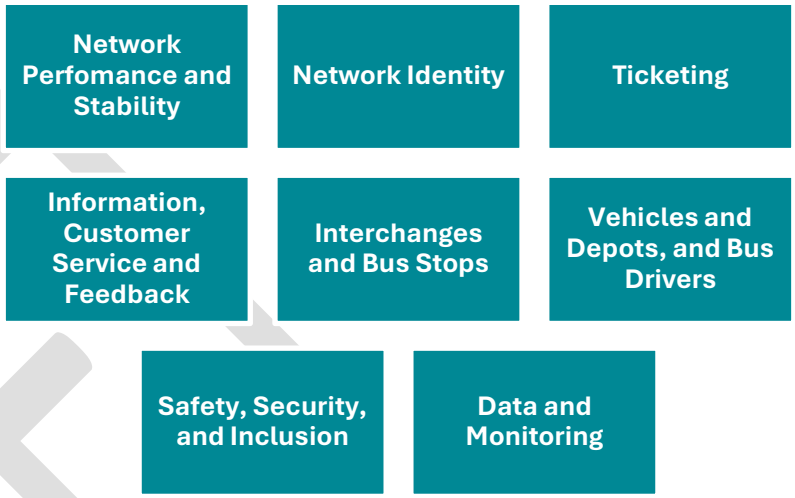


Figure 3. Key Quality Elements

7.1 Network Performance and Stability

Why are network performance and stability important, and what's the situation in the South-East of Scotland?

Journey times, **journey time variability**, and **service reliability** are fundamental **performance elements** of any bus network. This includes ensuring that bus journeys are timetabled to be as fast as possible to provide their given service purpose, and that registered services run on time (i.e. are punctual) and operate as scheduled, without cancellations or premature terminations (i.e. are reliable).

Bus operators are required to meet standards for punctuality and deliver timetabled services as registered. If they don't, they risk facing sanctions from the Office of the Traffic Commissioner. While allowances are made for uncontrollable factors (e.g. accidents or passenger illnesses), operators are expected to put practical controls in place to manage other issues, such as driver absences or vehicle breakdowns, by having sufficient staff, spare vehicles and response units.

Many network performance challenges faced by bus operators are beyond their control, such as traffic congestion and varying road conditions. In such conditions, operators often need to extend journey times to maintain punctuality and reliability. Indeed, congestion is one of the main problems facing bus operations in the SEStran region, particularly in and around Edinburgh and other urban areas. It increases operating costs and journey times, which can raise prices or restrict the scale of the network, reduce the attractiveness of bus services, and erode passenger numbers. [13] Road incidents, such as vehicle breakdowns and parking in bus lanes, bus boxes, and on yellow lines, also contribute to these problems.

The SEStran RBS Public Survey confirmed that slow journeys due to congestion and indirect routing remain a core complaint, with passengers specifically calling for faster, more efficient travel and the introduction of bus priority measures. Respondents also cited "excessive stops, indirect routes, and congestion" (especially in Edinburgh) as key reasons why bus journeys often take significantly longer than travelling by car.

Poor network performance can erode customer confidence, prompting people to seek alternative travel methods or avoid travel altogether. This issue is especially problematic for those who rely on buses for essential journeys, such as accessing employment, education, training, or healthcare, and is particularly acute in areas with low service frequencies or few alternative travel options. Vulnerable groups—including children, elderly people, disabled individuals, and those on low incomes—are at greater risk of being unfairly impacted by these service issues. Such equality risks refer to the likelihood that these already disadvantaged groups will face additional barriers or exclusion due to unreliable or inadequate public transport, further limiting their ability to access vital services and opportunities.

[13] RTS Main Issues Report | SEStran

Customers in the SEStran region have varying perceptions of whether buses operate on time, with 88-90% of regular bus passengers in the City of Edinburgh, Fife and Midlothian agreeing that they do, with all other authority areas falling below the Scottish average of 80%. The figures are as low as 65% and 70% agreement in Clackmannanshire and Falkirk respectively. [14]

The evolving nature of transport demand, along with operational requirements like road network changes and temporary closures, necessitates changes to bus services from time to time. However, from a customer perspective, some level of **network stability** is crucial.

In the SEStran region, there are large inconsistencies in perceptions of network stability, for example 98% of bus users surveyed in Midlothian agreed with the statement that their *network is stable and isn't regularly changing*. However, in Clackmannanshire and Falkirk only 71% and 74% agree respectively. [14] Existing customers with established travel patterns can be unsettled by timetable changes, while potential new users may find the complexity of ever-changing routes and operators a barrier. Additionally, changes often result in reduced services, as was noted in the SRBS Case for Change report for many areas in the SEStran region. This can lead to passenger dissatisfaction, especially if changes are not adequately consulted on, effectively communicated, or negatively impact established travel patterns.

Insights for Network Performance and Stability from Our Strategy Survey

A reliable and stable bus network is crucial for public confidence and sustained usage. Survey results show that concerns about punctuality and service reliability remain significant barriers for many passengers:

- 61.2% of respondents have avoided using the bus due to worries it would not arrive on time.
- 44.0% expressed concern about possible cancellations.
- Only 5.5% have never avoided the bus for these reasons.

Changes to routes and timetables generally led to greater inconvenience:

- 49.3% found their journeys became harder or more inconvenient.
- 33.2% stopped using the bus for certain trips.
- 16.5% stopped using the bus for most or all trips. Alternatively, just 4.9% found journeys easier and only 4.0% increased their bus use following changes.

There is also a significant gap in service performance information:

- 52.1% do not feel they have enough information on local bus performance (e.g., punctuality or delays).
- Only 22.4% feel well-informed.

[14] 2022 Scottish Household Survey, asked 2021 | Scottish Government

Passengers' top priorities for service stability and performance are clear:

- 86.7% ranked on-time buses as the most important feature.
- Other valued features include quick journeys (37.5%), clear and up-to-date communication about route changes (35.9%), minimal cancellations (32.6%).

In summary, improving bus punctuality and reliability, better managing changes, and enhancing communication and transparency around performance are essential to building public confidence and encouraging greater use of bus services. Addressing these areas will align the network with core user expectations for stability and trustworthiness.

What does a high-quality bus network look like for network performance and stability?

Achieving the best possible network performance requires a combination of efforts, coming from multiple stakeholders:

- Giving passengers confidence that timetabled services will run:
    - **Guaranteeing vehicle availability and appropriate maintenance**: Sustain a sufficient number of well-maintained vehicles to operate services, including contingencies for unexpected issues.
    - **Improving driver availability**: Address recruitment, training, and retention challenges to ensure enough drivers are available to operate services and handle eventualities such as sickness or lateness.
- Giving passengers confidence that buses will be on time while offering the quickest possible journey time:
    - **Prioritising predictable journey times for buses**: Reduce overall traffic volumes and congestion, and physically prioritise bus movement over private cars, including parking spaces, in line with the sustainable travel hierarchy.
    - **Managing road closures, diversions, and roadworks:** Work with operators and authorities to minimise delays, adjust routes swiftly, and keep buses running on time, reducing disruption for passengers.
    - **Effective incident response and enforcement**: Facilitate easy monitoring and response to incidents and road regulation infringements through cooperation between key stakeholders. For example, bus operators should be able to report repeat parking infringements or incidents affecting performance, prompting a robust response from transport authorities and enforcement agencies.
    - **Fostering a resilient public transport network**: Prioritise integration and resilience of bus services with other modes to improve the attractiveness and efficiency of public transport. Increase service frequency and provide alternative travel options (such as a 'last bus guarantee') to enhance flexibility and passenger confidence during disruptions.

To ensure the **stability** of the bus network, long-term plans should be developed. These plans are usually objective-led and take into account various forecasts for transport demand. They also utilise planning data available to transport authorities, including overarching transport plans, land use plans, traffic demand forecasts, and economic forecasts.

However, adhering to network plans can be challenging due to external pressures such as funding and the need to adjust services to:

- Deliver journey time efficiencies.
- Respond to changes in demand, ensure commercial viability, or make services more attractive.
- Accommodate short-term timetable changes for roadworks and road closures.

Therefore, to enhance network stability, it is crucial to have effective procedures for managing any changes. This potentially includes establishing a set of standards (beyond the minimum required for registered bus services) that dictate how and when changes are made, how consultations are conducted, and how communication is maintained with authorities, bus users, and other key stakeholders.

Further key principles for a stable network include:

- **Long-term funding settlements**: Secure sustained funding to implement initiatives, support bus services, and manage changing costs. Stable, multi-year funding is particularly important for local authorities, community, and third sector operators to maintain and support services. Dependence on short-term, annual budgets creates pressure on initiatives and increases the risk of service cuts when funding changes ("funding cliff-edges").
- **Minimising the frequency and scale of bus service changes**: In many world-class bus networks, fixed change dates for timetables and routes are established throughout the year, and limits are placed on the scale of changes possible within a given time period. This approach allows for:
    - Improved communication with customers and better forward planning.
    - Efficient workload planning for those involved in delivering and communicating network changes and coordinating responses to changes (e.g. via the subsidised network).
    - An overall perception of greater stability among the public.
- **Enhanced consultation:** Engage operators, local authorities, and communities to gather input on proposed network changes, with particular focus on those most reliant on bus services. Such engagement helps local authorities better assess and respond to the need for supporting essential services.
- **Minimise disruption caused by road closures, diversions, or roadworks** through effective co-ordination between bus operators, local authorities, and traffic management teams. Early notification and collaborative planning help maintain service stability and ensure that passengers receive timely, accurate information about any temporary or permanent changes to bus stops, routes, or timetables. This approach is particularly important for protecting vulnerable users and maintaining confidence in the network during periods of disruption.
- **Improved communication of changes**:
    - **Timely communication**: Inform stakeholders as early as possible and continue to provide updates leading up to the change.
    - **Targeted messaging**: Recognise the different impacts on various users and use appropriate communication channels. This includes providing accessible content, real-time screens and apps, and audio-visual notifications.
    - **Clear information**: Offer detailed explanations about the changes, including the reasons behind them, their impact on

connections and schedules (such as first and last buses), and available alternatives.

- **Data sharing**: Share information with other parties to ensure consistency and accuracy.

Enhanced Information to Aid Network Stability Decisions

Section 39 of the Transport (Scotland) Act 2019 introduced a new information-sharing process concerning local service registration and notifications from bus operators regarding variations or cancellations of service registrations.[15] These powers enable a local authority to request information about the service or part of the service being altered, including details such as the number of journeys undertaken, the number and types of passengers, fares paid, types of fares and tickets used, and the revenue received. An authority can only require information in respect of the preceding 12 months.

This information can only be requested for specific purposes, namely when local authorities are exercising their functions under Section 63 of the Transport Act 1985. This section relates to securing the provision of public transport services to meet any public transport requirements that they believe would not be met by the open commercial market. The information obtained can assist local authorities in understanding the reasons for the changes being made and in making informed decisions to ensure network stability, potentially through measures such as subsidising the service.

In Ireland, for example, all changes to the registered bus network are scrutinised before approval. This process includes public consultation and review by Ireland's public transport licencing agency and transport authority for Greater Dublin, the National Transport Authority, for feasibility, demand, and potential impact of the changes on other services, residents and other stakeholders. After implementation, the changes are monitored and evaluated to ensure they meet the intended goals and address any issues that arise.

Technology and Artificial Intelligence (AI)

Modern bus networks increasingly incorporate advanced technology, such as AI and analytics, to enhance service performance, reliability and resilience. By processing real-time and historical data, AI can optimise timetables, anticipate and resolve reliability issues, and support effective incident response, enabling more proactive and efficient network planning and management. Further detail on data and emerging technologies is provided in *Section 7.8: Data and Monitoring*.

What is the focus of this Strategy?

Rising car usage in the region could lead to bus journey times becoming longer and more variable, with punctuality and reliability and bus speeds being negatively impacted. Without intervention, this has the potential to lead to falls in patronage, operating cost increases, and fares increases, creating a feedback loop of bus decline, as outlined in the National Transport Strategy 2 (see Figure 4).

[15] Service information when varying or cancelling registration | Transport Scotland

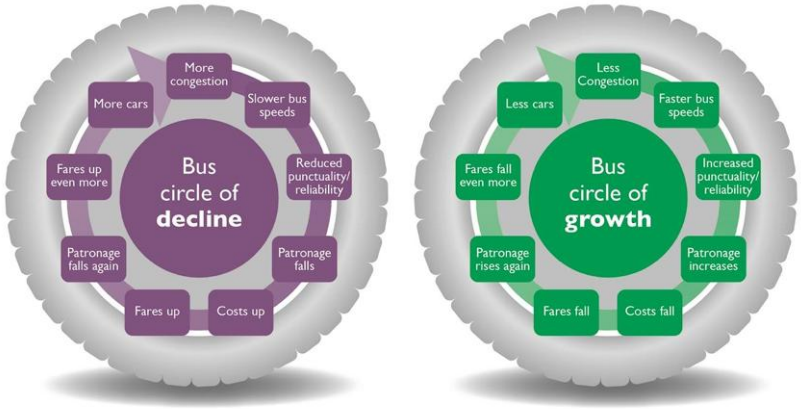


Figure 4. Bus Circles of Decline and Growth – NTS2

As such, the SRBS will concentrate on working with key partners and stakeholders to both safeguard the performance of the bus network against future pressures, such as growing congestion on the road network and competition for road space with other modes, and improve performance for areas which already experience issues. This includes a focus on bus services delivering key regional movements, but also wider support for improvements across the region to provide a consistently positive experience for bus users and help reduce the cost of bus operations.

To do this, the SRBS seeks to reinforce the key principles of the policies set out in SEStran's RTS to support **bus priority measures** (see Appendix A), to:

- Deliver regional, cross-boundary, quality bus corridors that link up with urban centres.
- Provide journey times which are comparable with car.
- Design bus priority into all major infrastructure and new development.
- Provide adequate enforcement of bus priority measures. This aligns with the NTS2's sustainable investment hierarchy, which prioritises: reducing the need to travel unsustainably; maintaining and safely operating existing assets; and making better use of existing capacity before considering targeted infrastructure improvements.
- Consider Bus Rapid Transit (BRT) on high-demand corridors where sufficient priority cannot be provided within the constraints of the existing road network.

The RTS also advocates for the application of the NTS2's sustainable travel hierarchy principles to reallocate road space from general traffic to specific groups of road users, including public transport and active travel. It emphasises that road space allocation should be a significant consideration in new developments.

Building on these points from the RTS, the RBS prioritises improvements in vehicle availability and reliability, driver coverage, incident and issue reporting and response procedures, and enhanced enforcement of issues affecting bus movement on all key regional routes, including areas without bus priority measures.

Alongside this, a focus on reducing car use in the region will be key to ensuring the right environment for the delivery of an attractive and efficient bus network.

From the perspective of **network stability**, the processes for implementing network changes across the region will be reviewed, and potential improvements will be explored. This will involve understanding the reasons for changes, with the aim of addressing

and mitigating any negative impacts on users and perceptions of the bus network.

SRBS Policy for Network Performance and Stability

The following policies have been developed for the **Improve Service Quality** core policy area, for **Network Performance and Stability:**

- Progress the policies and actions set out in the RTS related to bus priority, road space reallocation, and bus rapid transit to reduce bus journey times and improve bus journey time reliability.
- Support a balanced approach to road space reallocation between bus and active travel schemes, as well as an increased role for bus operators in the development of road space reallocation proposals.
- Improve the performance of bus services for key regional movements and across the region in relation to reliability and punctuality by enhancing vehicle reliability, vehicle and driver availability, improving the resilience of the bus network, and by prioritising consistent bus journey times.
- Support measures to reduce car use to protect and improve bus journey times and reduce journey time variability to deliver an attractive and efficient bus network which promotes passenger growth.
- Improve the stability of the bus network by exploring enhanced processes relating to longer-term funding settlements and service guarantees, changes of service, to reduce impact on users, and improve consultation, communication and information-sharing with key stakeholders.

Actions to Deliver the Policies

The following actions have the potential to help deliver the policies, and will inform the options to be appraised:

- Progress the policies and actions set out in the RTS related to bus priority, road space reallocation, and bus rapid transit. Where barriers have been met in the delivery of these, such as due to the pause in Transport Scotland's Bus Partnership Fund, work with stakeholders to explore alternative avenues for delivery within the means available to funding partners.
- Develop a framework to guide a balanced approach to road space reallocation between bus and active travel schemes. This should consider an increased role for bus operators in the development of road space reallocation proposals.
- Engage with stakeholders to identify collaborative actions and share knowledge to:
  - Improve vehicle reliability and availability for the delivery of services, including assistance in developing robust and ambitious fleet renewal and upgrade plans.
  - Overcome driver availability issues, such as joint training, recruitment and retention efforts across the industry within the region. Some early progress has been made on this through the Bus Driver Recruitment Roadshow, facilitated by

the Workforce Mobility Project as part of the Edinburgh and South East Scotland City Region Deal.[16]

- Improve incident and issue reporting and response procedures affecting reliable and punctual bus operations across the region, including enhanced enforcement where problems are affecting the movement of buses for key regional movements.

- Work with local authorities and bus operators to improve the transparency for users of bus reliability and punctuality performance across the region, along with the actions being undertaken to monitor and mitigate cases where performance falls below acceptable levels.
- Engage with local authorities and bus operators to review and strengthen procedures for making changes to the bus network, with the goal of enhancing network stability. This should include improved processes for managing service change rates, consultation, communication, and information-sharing with key stakeholders, including utilising provisions under the Transport (Scotland) Act 2019 for sharing information on local service changes. Additionally, opportunities related to the upgrade of legacy Traveline Scotland services as part of Transport Scotland's Digital Travel Data Services (DTDS) project should be explored in partnership with Transport Scotland.
- Engage with local authorities, bus operators, and community service providers to identify how short-term funding affects the stability of supported, community, and third sector services, and agree on actions to address these barriers.
- Explore rationalisation and optimal siting of bus stops to improve network efficiency and legibility, ensuring an appropriate balance between coverage and journey time.
- Continue to engage on and support initiatives which reduce car use and reduce the impacts of traffic congestion on bus services.
- Explore the application of Artificial Intelligence (AI) and advanced analytics as outlined in Section 8.9 (Data and Monitoring), to support improvements in network performance, stability, and resilience by optimising timetables, predicting and mitigating reliability issues, enhancing incident response, and informing targeted interventions for areas most at risk of service disruptions.

[16] Bus Driver Recruitment Roadshow | SEStran Website, 2024

7.2 Ticketing

Why is ticketing important, and what's the situation in the South-East of Scotland?

Effective ticketing is high on the transport agenda, being important for the ease of use, affordability, accessibility, and seamless integration of public transport services. Both the SEStran RTS and Transport Scotland's Strategic Transport Projects Review 2 (STPR2) underscore the necessity of integrated ticketing within their key themes and recommendations. Integrated and affordable ticketing is essential for delivering the ambition of a strong level of service throughout the region.

The SRBS Case for Change demonstrated that ticketing options for bus are complex across the region,[17] with most tickets only valid on a single operator's services. The multi-modal and multi-operator OneTicket, which permits travel on both bus and rail within and between zones in the SEStran area, is not widely used, although its popularity is increasing. Lothian Buses and Edinburgh Trams have expanded *TapTapCap* for contactless auto-capped tickets to cover both modes.

Ticketing in the SEStran region is moving in the right direction, with elements of a high-quality ticketing system being evident in places. This includes wide adoption of contactless payment for tickets and the availability of smart ticketing options (e.g. cards and apps) within individual operators, and some limited multi-operator and multi-modal ticketing options. Indeed, Transport Focus's 2023 'Your Bus Journey' data for the SEStran region showed that contactless and smartcard payment use is ahead of the rest of Scotland at 32% compared to 23% and 29% compared to 22% respectively. However, from a regional travel perspective, these ticketing elements remain fragmented and complex for many users. Our survey found that 45.1% of respondents desire a single ticket across bus, tram and rail.

Lothian Buses offer a daily and weekly fare cap for contactless payments made with the same card. Other larger operators provide contactless payment and the pre-purchase of tickets via mobile apps. However, most ticketing products remain limited to single operators and modes, and auto-capping is not available across different operators. Consequently, many journeys, particularly at a regional level, are complex to plan, undertake, and pay for, especially for infrequent users for whom this is likely to be a deterrent to use.

ABC Multi-Operator Bus Ticket

Stretching into the SEStran region, the ABC ticket enables flexible travel across Dundee and East Fife, valid on Stagecoach, Xplore Dundee, and Moffat & Williamson services. Supported by local councils, it offers convenient day and weekly options for different zones, with tickets available via bus apps and smartcards.

Frequently, users must research ticket options and prices for each leg of their journey and purchase multiple tickets separately. The OneTicket looks to address this but requires pre-planning so as to

[17] RTS Main Issues Report | SEStran

identify in advance whether it will offer best value for money, and it is sold separately via a standalone app or at rail stations for multimodal rail and bus journeys, adding another layer of complexity. Existing multi-modal/multi-operator options do not currently support changes to travel plans during the course of a day or week – changing plans is likely to result in a financial penalty. This complexity is a particular barrier for new users.

In relation to purchase options, there are limited opportunities for physical prepayment of bus tickets, with the majority of pre-purchase only being possible via digital means. Pre-purchase of tickets can improve bus boarding times.

Insights for Ticketing from Our Strategy Survey

Survey responses indicate that while most passengers find it easy to buy the right bus ticket, there is still notable confusion and demand for improvement.

Ease of Ticket Purchase:

- 37.8% find it very easy, and 24.0% quite easy to buy the right ticket.
- However, 33.0% are neutral or unsure, and 5.2% find it quite or very difficult.

Ticket Validity Confusion:

- Although 43.4% have never been unsure about ticket validity, over half (56.6%) have experienced this uncertainty at least rarely, sometimes (24.7%), or often (7.5%).

Impact on Bus Use:

- 78.6% have never avoided bus travel due to ticketing confusion.
- Yet, 14.2% have occasionally or frequently avoided using the bus because of confusing ticketing.

Key Priorities for Ticketing Improvements:

- 50.4% rate automatic fare capping as most important, ensuring the best value fare.
- 45.1% desire a single ticket valid across bus, tram, and rail.
- 34.0% seek tickets usable with all bus companies.
- Additional priorities include clear, centralised ticketing information (27.6%), flexible ticket options (26.9%), and easy access to tickets without needing a smartphone or internet (25.5%).

In summary, most passengers navigate ticketing with relative ease, but some experience some confusion, especially regarding ticket validity across different operators. There is a strong demand for more integrated, simpler, and flexible ticketing solutions—particularly automatic fare capping and multimodal tickets—to further reduce barriers and create a more user-friendly public transport system.

What does high-quality ticketing look like?

The core principles of a high-quality ticketing system can be considered as:

- **Simplicity**: Ensuring that ticketing choices and purchases are easy to navigate for users, with ticketing formats suitable for all users, and including pre-purchase options to reduce the need for time-consuming purchases on-board vehicles.
- **Flexibility**: Allowing users to travel as seamlessly as possible across operators, modes, areas, and timescales, within reason.

- **Value and Affordability**: Ensuring that:
  - Ticketing flexibility provides value for money for the user, rather than imposing a cost premium that may exclude some individuals.
  - Tickets are affordable within the given socio-economic context and in relation to travel by car.
  - Ticketing options enable users to access their entitlements to free or reduced fares where needed (see the section above on affordability).

There are strong examples across the UK where region-wide ticketing solutions have been implemented. The most notable of these is Transport for London's (TfL) Contactless & Oyster system, which offers smartcard and contactless auto-capped fares across transport modes, including a stored value and 'pay as you go' option. Specifically for buses, TfL fares are flat, with the Hopper fare allowing multiple journeys provided that travel starts within an hour of the initial 'touch in'. Additionally, the daily cost is capped at the price of three Hopper tickets, enabling several multi-leg journeys in a day while ensuring the customer can be confident of the maximum cost.

The operational context in the SEStran region differs significantly from that of the area covered by TfL. While TfL provides a useful example of what is possible, other regional schemes in more comparable areas merit consideration. Combined Authorities such as the West Midlands, Greater Manchester, and Liverpool have built up integrated ticketing offers overs time, including area-wide tickets across multiple formats:

- In the Liverpool City Region, the Bus Alliance, a partnership between the region's combined authority and operators Arriva and Stagecoach, provides integrated ticketing. This includes the adoption of the Merseytravel Smart Ticket (MetroCard) on all buses and the ability to store operators' own ticketing products on this platform.
- The West Midlands' Swift smart ticketing system is the largest contactless system outside London. The Swift Go system provides daily, 3-day, and weekly capping. Smart ticketing is valid on the bus network, as well as the tram and rail networks across the area, and includes some parking locations.
- TfGM offers AnyBus travelcards for any bus in Greater Manchester, Bee Bus Travelcards for Bee Network bus services that extend beyond Greater Manchester, and Multi tickets (Bee AnyBus + Tram) for integrated bus and tram travel, which are up to 20% cheaper than purchasing tickets separately.

The concept of Mobility as a Service (MaaS) — integrating planning, payment, and ticketing for multiple transport modes within a single platform — has been piloted in the region through the SEStran-led GoSEStran project, providing valuable local insights into seamless and flexible travel. These key MaaS principles are embedded within this strategy's approach to ticketing, and as such, MaaS is not addressed separately in the sections that follow.

At the national level, Transport Scotland's **Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024** sets out a roadmap for the coming decade, focusing on the enhancement of smart, integrated ticketing and payment systems across the country. By collaborating closely with operators, local transport authorities, and stakeholders, the strategy aims to make public transport more accessible, affordable, and user-friendly. Through this coordinated approach, it aims to support a healthier, fairer, and more prosperous Scotland.

The strategy outlines the establishment and ongoing sponsorship of the National Smart Ticketing Advisory Board (NSTAB), which is tasked with advising on technical standards and supporting the practical implementation of smart ticketing provisions, including those introduced by the Transport (Scotland) Act 2019. Key elements of the strategy – such as increasing accessibility, ensuring technical interoperability, and delivering value for money – are expected to offer opportunities to the SEStran region as these initiatives move forward.

The Transport (Scotland) Act 2019 will strengthen the powers and responsibilities of local transport authorities, encouraging collaborative approaches to develop best-practice ticketing schemes that address local needs, include additional modes and services, and employ modern, consistent ticketing technologies – all within a nationally aligned framework.

What is the focus of this Strategy?

During the development of the SEStran RTS, stakeholders emphasised the necessity for integrated ticketing for public transport and mixed-mode journeys within the area. This led to a key policy objective of implementing an integrated ticketing system across all modes of transport in the SEStran region. The RTS also identified that better integrated ticketing is needed between public transport operators, and set out an action to deliver integrated ticketing systems, potentially incorporating fare capping, which can be used across all modes of public transport and operators, taking into account the digital provision differences in urban and rural areas.

The SRBS Case for Change indicated that further improvements in ticketing integration are necessary within the region.

Where multiple operators exist, as in the SEStran region, several key challenges arise in making ticketing simple, flexible, of value and affordable. These challenges include:

- Ensuring that integrated tickets are suitable for users in terms of ticket media and payment options.
- Balancing the prices of multi-operator tickets with those of individual operators, as multi-operator ticket options often carry a cost premium compared to individual operator products. This issue also affects multi-modal tickets; existing products such as Plusbus and OneTicket can be cheaper in some instances but do not guarantee the best value.
- Existing competition law complicates fare setting for integrated ticketing by placing restrictions on multiple operators agreeing on certain fares. [18]
- Agreements on revenue sharing are required between operators to facilitate a full suite of multi-operator tickets, but these agreements are also closely restricted by competition law.
- Individual operators may be unwilling or unable to sell integrated ticket options.

[18] Transport ticketing schemes: what's allowed under competition law | Competition and Markets Authority

- Delivering a consistent and comprehensive implementation of smart ticketing technology is necessary to allow for holistic solutions, such as compatible card readers, apps, and back-office processing to implement a contactless ticketing system with auto-fare capping.
- Justifying ticketing integration in areas heavily dominated by a single operator, where there is little financial incentive or public pressure for operators to accelerate change.

This RBS seeks to initiate responses to these and other challenges affecting improvements to ticketing in the region. In particular, the Strategy will focus on challenges impacting cross-boundary and regional-level travel solutions, while also supporting an overall push for improvements at a local level. SEStran, as a regional partnership, is particularly suited to this purpose.

SRBS Policies for Ticketing

The following policies have been developed under the **Improve Service Quality** core policy area, for **Ticketing**:

- Progress the policies and actions set out in the RTS related to integrated ticketing.
- Encourage a ticketing system that instils the principles of simplicity, flexibility, value and affordability for users. This should include addressing challenges for cross-boundary and regional movements, alongside a promotion of the same values at a local level.
- Work towards a fully integrated multimodal ticketing system with fair and transparent operator revenue apportionment arrangements.

Actions to Deliver the Policies

The following actions have been proposed to help deliver the policies:

- Support actions to improve integrated journey planning, payment, and ticketing for different modes and operators as outlined in Transport Scotland's 'Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024'.
- Conduct a ticketing review, engaging with bus operators, local authorities, and other stakeholders to set out actions which will:
  - Ensure ticketing supports the delivery of the affordability policies set out in this Regional Bus Strategy.
  - Ensure that all operators in the region support contactless payment options. This includes the integration of contactless payment systems with fare capping mechanisms across operators and areas, then modes.
  - Take actions to simplify the ticketing offer in the region.
  - Develop frameworks for revenue sharing among operators to support the implementation of integrated ticketing systems.
  - Ensure that digital ticketing solutions, or alternatives, are accessible to all users, including those in rural areas and those who may not have access to smartphones or the internet.
  - Explore the potential role of the powers set out in the Transport (Scotland) Act 2019 and other partnership

arrangements to deliver improved integrated ticketing any payment in the region.

  - Provide incentives for operators to participate in integrated ticketing schemes.

- Engage with Transport Scotland and the National Smart Ticketing Advisory Board (NSTAB) on the 'Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024' to ensure that the strategy meets the needs of the region, and to identify opportunities to maximise the benefits of proposed enhancements to smart and integrated ticketing and payment systems.
- Engage with Transport Scotland and other stakeholders to explore improved integrated ticketing between bus and rail, building on opportunities created by the public ownership of Scotrail Trains Limited (SRT).

7.3 Network Identity

Why is network identity important, and what's the situation in the South-East of Scotland?

A recognisable identity can facilitate users' understanding of how the components of a bus network interconnect. For instance, consistent branding across vehicles, information sources (e.g., websites, apps, timetables), tickets, and infrastructure (e.g., bus stops, interchanges) can signal to users that these elements belong to the same transport system. This is crucial for navigating complex networks involving different operators, ticket types, fare structures, usage policies, and infrastructure providers. Conversely, a multitude of distinct identities, indicative of poorly integrated network elements, can overwhelm users. While vehicle branding can also support network identity, its importance and deliverability varies by context, and the key aim is to ensure the overall network is legible and easy to navigate for travellers.

The concept of a regional network identity is that, as genuine integration is achieved across the bus network at a regional level, it can be communicated to users through recognisable branding and a unified set of resources, values, and policies. When an identity banner becomes synonymous with high-quality experiences, it can instil trust and confidence in users, thereby increasing patronage.

In the SEStran region, there is no common regional network identity. Instead, multiple separate network identities exist, reflecting the various independently operated, managed, and funded bus networks and their supporting elements across the region. For users, the 'network' they encounter depends on their travel location, the bus operators running services there, the authorities providing infrastructure and other elements, and the third parties offering products and services in the area (e.g., travel apps, websites, and ticket providers). In some areas, particularly where one operator dominates the market, there is limited incentive to present an integrated identity with wider areas.

The SRBS Case for Change highlighted the following issues:

- There are physically separate networks resulting from the limitations of direct bus services. Bus operations in many SEStran area local authorities offer restricted regional movement opportunities. Many regional bus services across the area are focused on Edinburgh, and even within Edinburgh, services are heavily concentrated on radial corridors with fewer orbital services. Without proper integration and opportunities for interchange, these bus networks often appear isolated from a user's perspective.
- The SEStran region comprises several largely separate networks due to the lack of truly integrated information, ticketing, and fares among bus operators.

Insights for Network Identity from Our Strategy Survey

The diversity of bus operators, branding, and signage in South East Scotland has a direct effect on passenger experience and network usability.

Survey responses reveal that inconsistent identity and information can lead to passenger confusion:

- 12.5% of respondents often experience confusion due to differences in bus colours, signs, or styles of information.
- An additional 27.0% reported sometimes being confused, while 29.4% rarely, and 31.2% never experienced this issue.
- This means over one third of passengers face confusion at least occasionally.

There is significant support for a more standardised, unified approach to bus branding and information:

- About half of respondents (combined 50.5%) believe having the same colours, branding, and information for buses operating together would be “very helpful” (26.0%) or “quite helpful” (24.5%).
- Just 9.9% found this approach not helpful, and 39.6% were neutral.
- Regarding the potential to increase bus usage:
- 31.5% would be more likely to use the bus if unified branding were introduced (11.0% much more likely, 20.5% a little more).
- However, 57.7% said it would make no difference, while less than 2% felt it would make them less likely to use the bus.

In summary, while most passengers can navigate the current system, a significant proportion experience confusion linked to inconsistent branding and information. Greater standardisation and integration of signage, colours, and route information could make the network more intuitive and accessible, with a moderate share of potential users stating it would positively influence their likelihood of choosing the bus and few saying they would be opposed to this.

What does a high-quality bus network look like?

Network identity encompasses customer-facing aspects of bus services, such as clear and consistent information at stops, on vehicles, online, through apps or smartcards, and potentially unified or coordinated elements across staff uniforms, ticketing, and vehicle livery. The extent of common branding—particularly on vehicles—may vary according to local needs and operational contexts, but the priority is enabling passengers to recognise, understand, and confidently use the network. This approach is exemplified by Transport for London (TfL) and is a common practice in many cities with world-class bus networks. The association of “red buses” with London resonates around the world, having been first established almost a century ago. Similarly, the recently launched Bee Network by Transport for Greater Manchester (TfGM), under a new franchising agreement, demonstrates the impact of significant investment in integrating network identity across buses and other sustainable modes of transport (see Figure 5, overleaf).

From a regional perspective, the development of a network identity can vary significantly, primarily constrained by the level of real service integration, the associated infrastructure and systems, and the delivery and operating models and organisations in place. To maximise value, any presented identity must be supported by genuine practical integration of these elements. In some countries, such as the Netherlands, the focus is on ensuring that tickets, fares, and systems

are well-integrated, making the network identity less critical, as users can trust that each service will function cohesively.

Table 2, below, sets out some of the ways that a network identity can be a created across different elements of service, and some of the key enablers for delivery.

Figure 5. TfGM's Bee Network Common Branding Elements

Table 2. Network Identity Improvements and Enablers

Service Element	Creating an Identity at a Network Level	Enablers
Information and journey planning before travelling, and customer service and feedback	• Instead of relying on various independently branded information and journey planning options, a single, comprehensive source of information is available for all operated services. This can be accessed across multiple platforms, such as a website, app, and call centre. • A unified and recognisable network map, with a consistent presentation style for associated timetables, is most effective when these styles are also reflected in physical information channels. • This cohesive identity should extend to the during-travel and post-travel stages, ensuring consistent customer service and feedback resources. • Unless brand differentiation is crucial (e.g. identifying airport services with dedicated fares structures), a single house-style for signage, marketing and communications will help passengers navigate the complexities inherent in any bus network (similar to the house style of TfL in London).	• A standardised approach across operations regarding the types and formats of information produced for timetabling, fares, and other service elements. • A coordinating body or partnership, such as Traveline / Digital Travel Data Service, responsible for presenting information in a unified manner. This should also include agreements on how information is updated digitally, in printed materials, and at physical stops and interchanges. • A collaborative stakeholder approach towards creating a common network identity, focused on maximising benefits for both users and bus operators. It is important to recognise that some stakeholders may require additional support to achieve this. • A unified approach to customer service and feedback channels, standards, and information handling.
Bus stops, interchanges, and at-stop and on-bus information	• Consistent branding across all customer-facing infrastructure, including interchanges, bus shelters, stop posts and flags, as well as other wayfinding and signage. • Instead of having separate physical bus timetables and maps for each operator, and varying at-stop information formats and resources at the local authority level, a single agreed approach and presentation style is provided to integrate information.	
Vehicles and Bus Routes	• In some cases, it is possible to brand vehicles and driver uniforms across the entire network area. Alternatively, operators may retain their primary liveries while incorporating some common network branding. • Branding can be applied to individual routes or groups of routes that offer a particular service type or meet a specific quality standard, such as high-frequency networks, park and ride services, or demand-responsive transport (DRT) services. • Instead of using separate (and often duplicate) operator route naming and numbering conventions, a coordinated approach to route numbering is implemented to enhance network legibility for users.	• Implementing common branding for vehicles and routes presents several challenges. These include the practicalities of delivering cross-boundary services, maintaining flexibility in vehicle deployment, and managing the costs and timescales associated with vehicle and media branding changes, which may involve partial or full repaints. • Securing buy-in from key stakeholders is crucial to overcoming these challenges. One of the most significant hurdles is convincing bus operators of the value of a common network identity, which may come at the expense of their individual branding. Operators invest time and resources in developing their own brands and may be reluctant to adopt a central network identity unless it offers clear benefits. • Certain routes or service types (such as high-frequency corridors, Park & Ride, or DRT) particularly benefit from special or common branding to highlight their network role. Where unified branding isn't practical, distinct operator brands could remain, provided other elements (like signage, information, and ticketing) offer sufficient clarity. The application of common branding on vehicles should be considered on a case-by-case basis, taking into account operational flexibility, costs, and benefits to users.
Ticketing	• A unified brand for area-wide ticketing options can significantly enhance clarity. The impact is maximised when the branding and livery of vehicles clearly indicate which services are accessible with which ticket. Care must be taken, as a mix of brands and liveries can lead to confusion.	• Development of multi-operator products and/or the simplification or replacement of single operator ticketing options.
Intermodal Options	• Integration with other modes of transport, such as rail, tram, and cycle hire, should also be clearly communicated.	• Integration of information, ticketing, fares, customer service, and feedback (or a combination of these elements) can significantly enhance modal integration from the user's perspective.
Accessibility & Inclusivity	• Users with specific mobility needs, such as disabled individuals or those lacking confidence in using buses, should be assured that measures are in place to meet their needs. These measures include high standards of driver training, cleanliness, and enhanced accessibility across all services under the unified network identity. Additionally, simplifying the provision of information is crucial for inclusivity. A single, recognisable brand for all information could greatly aid this simplification.	• Engagement and coordination with mobility groups to ensure that user needs are central to the improved network identity, thereby maximising accessibility and inclusivity benefits.

What is the focus of this Strategy?

Within the SEStran region, there are distinct identities among different operators, local authorities, and natural catchments of demand around key centres. In addition to branding, elements such as tickets, fares, and information also vary. As more operators enter the region or existing ones develop alternative apps, separate payment options, or information sources, there is a risk of further fragmentation. This will increase complexity for travellers.

Therefore, it is important to acknowledge that the region is a long way from having a unified regional network identity or the necessary enablers to create one at that level. This RBS focuses on outlining the policies and actions needed to initiate discussions about building a regional network identity for buses and other sustainable modes of transport. It considers the following key questions:

- Are there significant benefits from a user perspective that necessitates change?
- What could a regional network identity look like?
- Is 'regional', in the sense of SEStran, the correct geography for the network identity?
- What is the willingness for change amongst bus operators, local authorities, and the other key stakeholders that help to deliver transport across the region?
- What changes are required to deliver improvements?
- To what extent is it feasible to deliver these changes, including factors related to regional ambitions for improved integration of transport elements such as ticketing and fares?
- What resources are required, what is the best mechanism, and who are the key stakeholders to drive these changes forward?

SRBS Policies for Network Identity

The following policies have been developed under the **Improve Service Quality** core policy area, for **Network Identity**:

- Promote a positive, recognisable, and trusted bus network identity across the region, delivering improved consistency for users in identifying and engaging with information, ticketing, bus stops, interchanges, vehicles, and other key network assets. The strategy recognises that unified branding may not always be practical or necessary, and will prioritise measures that deliver clear benefits to users while acknowledging operational challenges.
- Enhance the integration of bus network identity with those of other transport modes to present a cohesive and user-focused public transport system.

Actions to Deliver the Policies

The following actions have been proposed to help deliver the policies:

- Collaborate with key stakeholders to initiate discussions aimed at establishing a regional network identity for buses and other sustainable modes of transport. This will address the key questions outlined in the SEStran Regional Bus Strategy.
- Identify major travel patterns which cross established operator or area boundaries, and result in "confusion" for users because they involve multiple identities, complex ticketing options, etc.

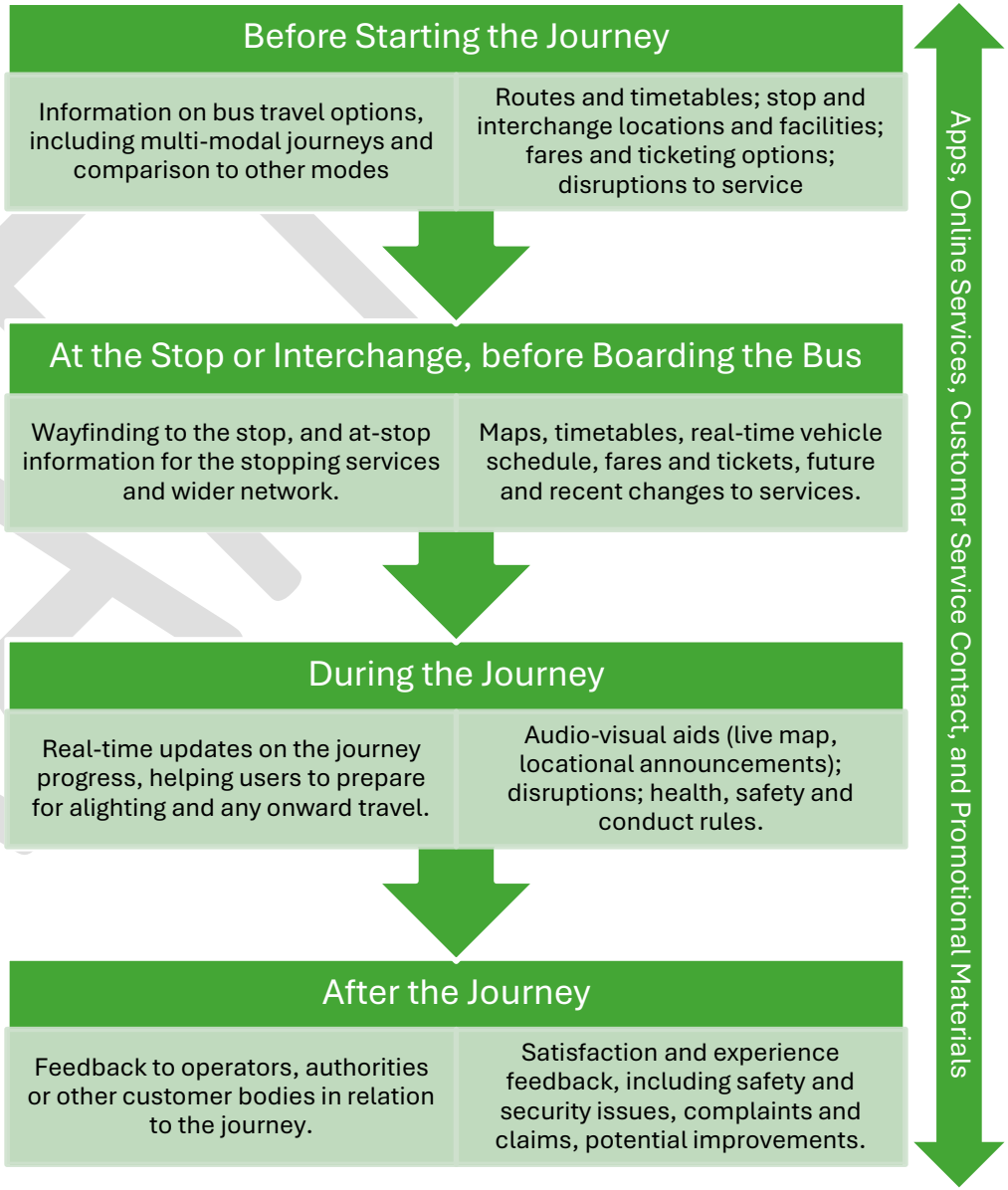
7.4 Information, Customer Service, and Feedback

Why are information, customer service, and feedback important and what's the situation in the South-East of Scotland?

Convenient access to accurate, easily understood and relevant information is key for users to make informed decisions about their travel options, e.g. what services are available and when, how much will it cost, what is the most appropriate ticket, what quality and complexity of journey can be expected, and are there any disruptions? Having access, or not, to this information can make the difference between someone travelling by bus, another mode, or not at all.

The RTS highlighted *confusing travel information* and that *people in the area do not have full awareness of their public transport options* as two of the main transport challenges for users in the region. At best, confusing information is an inconvenience for users, but at its worst it is a serious barrier to undertaking journeys by bus and other forms of sustainable travel. This can embed car reliance and impact those with specific travel needs and those most dependent on bus services the worst, e.g. those with mobility issues, young people and those suffering deprivation.

Information related to travel by bus can be broken down into the different stages of travel, as highlighted in the diagram opposite.



Effective customer services and enabling users to provide feedback are fundamental for managing live travel issues, identifying and responding to events after they have occurred, and learning from these. In the SEStran region, the majority of customer service and feedback processes are managed directly by bus operators. Consequently, there is considerable variation in both the access channels and the quality of these services. Independent satisfaction surveys are conducted across the region and country by organisations such as Transport Focus, and another key resource is Bus Users UK, the designated body for handling complaints under the Passenger Rights Regulation. Bus Users UK often serve as the point of contact for complaints unresolved by local processes. These independent channels can provide cross-operator insights and regional perspectives that may not be captured through individual operator or local feedback mechanisms.

A related aspect customer service and accountability is the implementation of **customer charters**. A customer charter is a formal document outlining the commitments and standards that a bus operator and/or transport authority promises to provide for its customers. For bus services, a customer charter serves as a benchmark for service quality, can enhance customer trust when delivered upon, and establishes a clear framework for accountability. It ensures that passengers are aware of their rights and the level of service they can expect, thereby encouraging a more transparent and customer-focused service environment.

At present, most bus operators within the SEStran region maintain their own distinct customer charters, reflecting each operator's unique standards, policies, procedures, and commitments. For customers travelling with multiple operators, this means they would need to familiarise themselves with each operator's specific service offerings to understand the differences.

Insights for Information, Customer Service, and Feedback from Our Strategy Survey

Survey responses reveal both advances and significant gaps in these areas across South East Scotland.

Finding Information:

- Only 15.3% find it "very easy" to access reliable, up-to-date information about bus travel.
- 41.3% find it "quite easy".
- However, 22.9% find it "quite difficult" or "very difficult," and 20.5% are neutral or unsure.

Main Information Sources:

- The most common sources are bus operator websites (62.3%) and journey planning apps (e.g., Google Maps, Citymapper, 49.9%).
- Digital platforms dominate, but over a quarter (26.8%) still rely on physical timetables at stops.

Live Information:

- The majority check live updates through bus company apps/websites (55.7%), but 20.6% do not seek live information.
- Accessibility barriers persist with both digital and non-digital tools, and information is often perceived as inaccurate or inconsistent, especially outside major towns.

Customer Service and Feedback:

- Only a small minority (6.5% “very easy,” 17.9% “quite easy”) find it easy to contact customer service or provide feedback.
- A significant 45.5% do not know how to get in touch or give feedback at all.
- Of those who have contacted customer service, email is most used (51.5%), with phone (27.9%) and social media (22.2%) less common.
- Most respondents (58%) have never contacted customer service or provided feedback.

Confidence in Feedback Making a Difference:

- Only 10.3% are confident their feedback would be listened to (2.5% “very confident,” 7.8% “quite confident”).
- The majority (57.5%) are not confident or not at all confident their input results in change.

In summary, while digital resources are heavily relied on for bus information, there are pronounced gaps in reliability, accessibility, and inclusivity—particularly affecting rural users and those without digital access. Customer service channels are perceived as difficult to access and unresponsive, leaving most passengers feeling disengaged from the feedback process. Addressing these issues is critical for building trust, clarity, and a higher quality passenger experience across the network.

Insights for Customer Charters from Our Strategy Survey

Awareness and Engagement:

- Engagement is very low:
  - 86% of respondents have never seen a bus Customer Charter; only 2.7% have read or used one, and 6.4% have seen but never used one.
  - 4.5% are unsure.
- Implication:
  - These figures highlight the need for greater visibility, accessibility, and communication about passenger rights and service commitments.

Desired Charter Features:

- Top priorities include:
  - Clear standards for reliability and punctuality (52%)
  - Transparent passenger rights (50%)
  - Effective feedback and complaints processes (48%)
  - Standards for vehicle cleanliness and comfort (39%)
  - Performance and accountability measures (32%)
  - Information about refunds, compensation, and lost property (31%)
  - Commitments to staff conduct and training (30%)
  - Accessibility and inclusion support (28%)

- However, 28% are not interested in a Customer Charter, reflecting a significant minority with other priorities or limited perceived value.

Open-Ended Feedback:

- Accountability and Enforcement:
  - Many stress the need for enforcement, clear objectives, and consequences if service standards are breached—such as financial penalties and greater staff authority to manage disruptive behaviour.
- Service Reliability and Integration:
  - Reliable, punctual, and frequent services—especially at night, in rural areas, and for connections—are essential. Better integration and coordinated timetables between operators are strongly desired.
  - There are concerns about service withdrawal or reduction without consultation.
- Safety and Comfort:
  - Personal safety, cleanliness, and clear standards addressing antisocial behaviour are key priorities.
- Environmental Commitments:
  - Some respondents want charters to include commitments to environmentally sustainable practices.
- Value of a Regional Charter – the majority support consistency:
  - 29% see a standardised charter across all operators as "very important", with a further 29% considering it "quite important".
  - 33% are neutral or not in favour, suggesting room for further discussion and engagement.

In summary, passenger awareness and use of existing Customer Charters are extremely limited, and there is clear demand for a visible, robust, and enforceable approach—especially around reliability, passenger rights, complaints, and accountability. A regional, standardised charter is favoured.

What do high-quality information, customer service, and feedback look like?

High-quality information and customer service are essential components of a successful bus network. **Accessibility should be prioritised to ensure all individuals can confidently navigate the transport system.** While many passengers rely on online platforms and mobile apps for journey planning and service updates, physical resources and in-person touchpoints remain necessary—offering convenience and reassurance, especially for those less comfortable with digital options. Real-time information panels, at-stop timetables and maps, accessible format printed materials, and audio-visual announcements all contribute to an inclusive environment.

Recognising the diversity of passengers is vital to providing accessible and equitable transport services. Individual needs can be shaped by a range of life circumstances, including learning difficulties, sensory impairments, and varied linguistic or cultural backgrounds. For instance, evidence indicates that people from Black, Asian, and Minority Ethnic (BAME) communities, as well as those whose first language is not English, may encounter challenges such as interpreting timetables, signage, notifications, and fares, or communicating with staff. These challenges are often exacerbated by language barriers and lack of familiarity with the transport network,

underscoring the importance of inclusive design and communication within public transport.

The Thistle Assistance Programme is an initiative designed to help disabled people, older adults, or anyone with hidden or temporary disabilities feel safer and more confident when travelling on public transport throughout Scotland. The programme provides a Thistle Assistance Card and optional app, which can be shown to transport staff to discreetly communicate specific needs – such as needing more time to reach a seat, extra assistance, or a request for clearer communication. Using simple icons or text, the card and app allow users to indicate required assistance without revealing personal details, ensuring discretion and dignity. The Thistle Assistance Card and app are recognised by the majority of public transport operators across Scotland, including buses, trains, and ferries. This initiative aims to break down barriers, improve the travel experience, and increase inclusivity for all who may require additional support.

To promote equity and accessibility, transport information should be presented in clear, simple language and, wherever possible, reinforced by visual representations and culturally inclusive icons. Multiple information channels and formats should be made available, allowing users to choose what works best for them. Importantly, translation services – whether written or verbal – should be widely accessible and clearly advertised for essential services. By being attentive to individual needs in communication and wayfinding, transport providers can create a more user-focused experience, ensuring that all passengers feel supported, respected, and valued when using the bus network.

Ensuring the **consistency and accuracy of data** is crucial for effective content management across all information sources for users. Reliable online information can typically be maintained by adopting robust data collation, sharing, and publishing standards, as well as utilising suitable APIs (Application Programming Interfaces) to distribute content such as real-time information.

As part of a national approach to improving passenger information, Transport Scotland's 'Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024' highlights the development of a **Digital Travel Data Service**, to aid the dissemination of travel information, including via Traveline Scotland and third-party channels.

Providing and maintaining up-to-date physical information, such as paper timetables and maps at bus stops or stations, can present more significant challenges and may be resource intensive. To address this, formal arrangements between operators and local authorities can be established to coordinate the frequency and scale of updates, as well as to agree on the processes and resources required when substantial changes are necessary. This also links to the Network Performance and Stability discussion earlier in this strategy (Section 7.1), related to *minimising the frequency and scale of bus service changes*.

Offering **an integrated source of information** presents clear benefits for users by simplifying access and ensuring visibility across all available service options, enabling comparisons between operators' services and fares. However, the abundance of information that a user may need to consider can sometimes be overwhelming. Therefore, simplified ticketing options, fare structures, and improved interoperability between services can help reduce information overload and improve the overall user experience (see Section 7.2 on Ticketing).

Finally, it is important to have an ongoing **process of continuous improvement** in place. Effective customer service and user feedback systems enable the ongoing review and enhancement of bus services. It is vital to ensure that users have a meaningful input into service decisions, feel valued, and trust that their concerns are being heard and addressed. Recognising that some groups of users – and potential users – may face greater barriers to engaging with feedback processes, it is important to use proactive and targeted engagement strategies, with particular attention to including individuals and communities who are typically underrepresented in standard feedback processes.

A **customer charter** provides a common resource to underpin high-quality information, service, and accountability for bus passengers. Typically, a customer charter includes:

- Passenger rights and conditions of carriage.
- Standards and procedures around health, safety and security, accessibility, and inclusion.
- Information on communication channels, customer service, feedback, complaints, refunds, mediation and appeals, response times, lost property handling etc.
- Clear provisions and policies for information, fares, and ticketing.
- Standards for physical assets such as vehicles, stops, and interchange facilities.

Exemplary customer charters go further, building in additional commitments to users. The feasibility and robustness of these commitments depend on the quality and consistency of services across operators and locations. Commitments can include:

- Measurable targets, with monitoring and public reporting, and clear actions if standards are not met (e.g. TfL's customer charter includes targets for reliability, safety, punctuality, and cleanliness).
- Enhanced offers such as commitments for price increase caps, tailored services for specific target groups, a last bus guarantee, or an on-the-spot refund policy.
- Enhanced staff and driver standards, such as training and customer support (e.g. boarding assistance).

Delivering a region-wide customer charter – particularly with multiple operators and authorities – requires strong partnership (sometimes formal), open dialogue, and thorough negotiation among all parties to define and agree on commitments and implications. Enforcement mechanisms may be needed to ensure accountability, such as contractual obligations, penalties for non-compliance, and public performance reporting. Regular reviews, informed by data and feedback, reinforce both accountability and continuous improvement in delivering high service standards.

Sufficient and sustained funding, and active engagement with existing and potential passengers, community groups, and accessibility organisations – such as the Mobility and Access Committee for Scotland (MACS) – are essential for implementing, monitoring, and shaping the customer charter to reflect real user needs and expectations.

What is the focus of this Strategy?

SEStran's Regional Transport Strategy (RTS) sets out policies and actions covering several key priorities aimed at improving the user experience across public transport in the South-East of Scotland. Among these priorities are:

- Ensuring that public transport information is provided in a variety of formats to meet the specific needs of all users, supported by appropriate wayfinding infrastructure across the transport network.
- Making Real Time Passenger Information (RTPI) available for all public transport modes—through mobile applications, at stations and stops, and across all parts of the region. This includes identifying areas of poor digital connectivity, where RTPI facilities may be ineffective, and working with partners to resolve these issues.

The SEStran Regional Bus Strategy (RBS) aims to enhance information provision, customer service, and user feedback by **emphasising accessibility, convenience, consistency, and regional integration**. The goal is to ensure a high-quality experience for users making strategic movements and cross-boundary journeys that involve multiple areas and operators. Improvements are intended to address the entire user journey, including pre-journey planning, at-stop experiences, during travel, and post-travel feedback.

Actions arising from the RBS will build on successful practices within individual areas and by different operators, promoting initiatives such as the Thistle Assistance Programme, which helps users with specific needs.

Regarding the development of a customer charter, the SEStran RBS recognises the potential value of introducing a region-wide charter to set clear expectations for service quality across the bus network. However, current barriers – including a lack of uniformity in customer offerings between areas and operators and competing demands for funding and resources – present challenges to immediate implementation. At present, the strategy prioritises addressing fundamental issues of integration and the creation of a seamless travel experience for regional users in a practical sense.

Consequently, initial actions will focus on initiating a dialogue with stakeholders regarding the potential for a customer charter and identifying the key enablers for its progression. The situation will then be monitored to determine an appropriate time to advance this initiative.

SRBS Policy for Information, Customer Service and Feedback

The following policies have been developed under the Improve Service Quality core policy area, for Information, Customer Service and Feedback:

- Progress the policies and actions from the RTS to ensure public transport information is available in a variety of accessible formats, supported by appropriate wayfinding across the network, and making improvements to real time passenger information availability and effectiveness.
- Promote a seamless and high-quality user experience for information provision, customer service, and user feedback across all stages of travel, including pre-journey planning, at the bus stop, on-board, and after travel is completed.
- Work towards the development of a region-wide Customer Charter in the long term, setting out the standards of service quality that users can expect when using the bus network.

Actions to Deliver the Policies

The following actions are proposed to support the delivery of the above policies. These actions address regional improvements, particularly for cross-operator and multi-area travel, and include **exploring, assessing interest in, and establishing, the necessary partnerships, processes, and resources to:**

- **Promote a unified source of information** to enable users to easily access accurate, comprehensive, and consistent travel details across all stages of their journey.
- **Ensure that information provision, customer service, and feedback mechanisms are accessible and inclusive**, catering to the diverse needs of all users. This includes promoting equitable access to public transport services and the feedback process, with proactive engagement of hard-to-reach groups to ensure all voices are represented in decision-making.
- **Prioritise accessibility, convenience, consistency, and regional integration** by learning from successful practices adopted by individual areas, operators, and other proven initiatives. These elements should support both strategic and cross-boundary movements, as well as local travel – particularly where multi-operator journeys are involved.
- **Enhance the collection and analysis of feedback data across the regional network** to identify common issues and areas for improvement. This will enable more effective and efficient service delivery and foster a culture of continuous improvement.
- **Promote data accuracy and expand the provision of real-time information** across all media channels to ensure users have reliable and timely access to travel updates.
- **Standardise customer service procedures** to provide users with clear expectations regarding response times and recourse options, thereby enhancing user trust, satisfaction, and confidence in the bus network.
- **Work towards a region-wide Customer Charter in the longer-term**, by:
    - Identifying common standards and commitments across bus operators, covering areas such as passenger rights, conditions of carriage, health and safety, accessibility, and customer service.
    - Assessing where shared standards are currently lacking and exploring options to address these, considering the diversity of operators and service areas.
    - Establishing a framework for the Customer Charter, including approaches to accountability, enforcement, funding, resources, and the potential for measurable targets and public reporting.

7.5 Interchanges and Bus Stops

Why are interchanges and bus stops important, and what's the situation in the South-East of Scotland?

Interchanges (including bus stations) and bus stops are crucial components of the bus network, serving as points where passengers can board, alight, and transfer between bus services, and connect with other modes of transport. These locations also provide passengers with access to information, tickets, and essential amenities. Well-designed, comfortable, safe, and well-maintained facilities can significantly enhance users' travel experience, making bus travel more appealing and potentially increasing ridership. This infrastructure is essential for delivering the ambition of a strong level of service throughout the region.

From an operational perspective, well-planned infrastructure can improve bus journey times, punctuality, and route efficiency. These facilities can also accommodate amenities for drivers and vehicles, such as toilets, changing rooms, and electric bus charging stations.

Interchanges come in various forms, ranging from enhanced bus stops to bus stations and multi-modal hubs. In the SEStran area, outside of Edinburgh, only 50% of households have direct bus connections to Edinburgh, with even fewer direct links to other cities like Glasgow, Dundee, and Stirling. Given the need for many passengers to change services or modes for local journeys, interchanges are particularly important.

Bus passengers in the SEStran region also have differing views on the ease of transferring from buses to other forms of transport. In West Lothian, 87% of passengers agree that it is easy, followed by 78% in the City of Edinburgh and 72% in Midlothian. However, all other authority areas fall below the Scottish average of 71%. The figures are notably lower in the Scottish Borders, Falkirk, and Clackmannanshire, with only 54%, 58%, and 61% of passengers, respectively, agreeing that it is easy. [19]

Within the SEStran region, there are facilities that integrate car travel with public transport (bus, rail, and tram), commonly known as **'Park and Ride'**. There are aspirations for improved and additional interchanges, often referred to as 'Park and Choose' or 'Mobility Hubs', which also offer enhanced active travel and shared transport facilities, providing local connectivity and linking with key active travel routes. These sites can include features aimed at vehicle decarbonisation, such as electric vehicle and e-bus charging infrastructure. Integrating bus services with car travel and other modes can, in theory, provide several benefits:

- **Reduction in traffic congestion**: By intercepting car journeys at the edge of urban areas, facilities can help reduce the volume of traffic entering city centres, and on main radial roads which may be core bus routes. This can potentially help balance capacity on these routes and allow for bus priority and / or active travel measures to

[19] 2022 Scottish Household Survey, asked 2021 | Scottish Government

be put in place. There is, however, a potential risk that some people that previously undertook their full journey by public transport will use their car to access better or cheaper services at the interchange site.

- **Improved accessibility**: These facilities can enhance accessibility to city centres and for inter-urban and long-distance travel for those living in suburban or rural areas. By providing a reliable and efficient means of reaching public transport networks, they can make them more accessible to a broader population. This is particularly true where active travel integration is at their core and car reliance isn't embedded as a requirement of use.
- **Travel time**: Effective bus priority infrastructure, such as bus lanes and priority signals, allows buses to bypass slow-moving car traffic. Key interchanges can serve as focal points for these priority measures. From a user perspective, bypassing a queue of traffic that the passenger would have otherwise been caught in had they continued to drive, is a strong selling point for bus use. At-stop and at-interchange facilities can also speed up boarding, such as ticket pre-purchase options and provide good information sources.
- **Cost savings and ease of access**: Changing mode can be more cost-effective than driving into city centres, if effective parking policies are in place. Additionally, if supplies of car parking are constrained this can act as a further lever to encourage bus use rather than car.
- **Environmental benefits**: Facilities can contribute to lower emissions by reducing the number of private vehicles travelling into urban areas. This helps in improving air quality and reducing the carbon footprint associated with travel.
- **Enhanced patronage**: Increased ridership can lead to more frequent services, benefiting urban users and the wider bus network. Long-distance and inter-urban route ridership can also be boosted; however, there are trade-offs for these services, as discussed later in this section.
- **Reduce the demand for urban and suburban road space**: by reducing traffic and parking demands on urban roads, there can be greater potential for road space reallocation towards sustainable modes such as bus and active travel. Informal Park and Ride practices can also potentially be avoided, where people park in suburban, often residential areas, near their destination or before travelling onwards by public transport.

In practice, there are competing challenges to delivering these benefits, such as ensuring the implementation of appropriate parking, pricing, bus service levels, and mode priority measures to encourage individuals to switch from cars to buses or other modes of transport. Providing attractive bus services for all users in the SEStran region is particularly challenging due to the diverse transport needs of different groups. These groups include urban, suburban, and rural residents; individuals with and without access to cars; people with physical mobility needs and disabilities; those facing financial constraints; long-distance and cross-boundary travellers, as well as local commuters. Balancing bus routes that serve specific interchanges with those offering more direct travel to destinations often involves trade-offs, potentially impacting travel time and operational costs. In the SEStran area, some express bus services bypass existing park-and-ride sites, thereby reducing the availability of bus services at those locations. Placing interchange stops on main roads, rather than within the P&R site, can help reduce the need for deviations.

In the SEStran region, various challenges exist concerning bus facilities, encompassing major interchanges, bus stations, bus stops, and shelters. These include:

- Obtaining financial resources for the development and maintenance of facilities, as well as for associated public transport services, information dissemination, and staffing, is a significant issue. Lack of funding can lead to the lack of new facilities, bus service levels being unattractive, poor-quality infrastructure and amenities, and maintenance and care issues that make use unappealing.
- Negotiating key road congestion points (such as the Edinburgh City Bypass, Queensferry Crossing and Tay Road Bridge) and major arterial routes, requires strategic placement of facilities to maximise their effectiveness. Interchange facilities can provide a potential solution to these issues but must avoid being impacted by them (i.e. users or buses being caught in congestion) or creating negative knock-on impacts on the transport network.
- There is inconsistency in the offering across the region. This can affect user confidence and attractiveness of the network as a whole or in specific areas and is an issue for equity of service for users.
- The lack of public sector control over some bus stations can be a constraint on the planning of their future roles. Similarly, not all of the existing Park and Ride sites in the region are under council ownership, which creates a constraint on maintaining and developing these sites.
- Existing Park and Ride sites in the region may not be ideally located or adequately serviced to provide a more attractive option than driving into urban areas and parking near a major bus corridor.

Insights for Interchanges and Bus Stops from Our Strategy Survey

In relation to Bus Stops, the survey highlighted the following.

Satisfaction:

- 10.5% “very satisfied,” 30.7% “satisfied,” but 29.6% dissatisfied (including 9.95% “very dissatisfied”).

Key Valued Features:

- Shelter (81.9%), proximity (65.0%), live travel information (63.9%), seating (42.7%), and cleanliness (41.2%) are most valued.

Barriers:

- Accessibility, safety, and lighting are important, especially for certain groups, though valued by fewer overall.

Areas for improvement:

- More shelters and seating; better cleanliness, lighting, and accessibility.

In relation to Bus Stations, the survey highlighted the following.

Satisfaction:

- 44.3% “very satisfied,” 23.6% “satisfied.” However, 24% dissatisfied or strongly dissatisfied, and 48.1% neutral.

Key Valued Features:

- Live travel information (67.7%), toilets (65.1%), indoor waiting/seating (57.1%), cleanliness (42.3%), safety/security (41.6%).

Other important factors:

- Easy connections, clear signage, location, and accessibility.

Improvement opportunities:

- Toilets and clean, secure waiting areas are especially important.

In relation to Park & Ride Sites the survey highlighted the following.

Usage:

- 8.4% use often, 34.5% occasionally; 51% either do not use or have no site nearby.
- Most used sites by respondents: Ingliston (37.4%), Sheriffhall (28.4%), Hermiston (24.0%), Straiton (19.7%), Halbeath (17.1%), Ferrytoll (14.6%).

User experience:

- 13.6% very positive, 49.5% positive; <9% negative or very negative.

Key Valued Features:

- Frequent connecting buses (77.8%), location (62.5%), live information (49.4%), parking cost (47.4%), route variety (46.9%), facilities (45.1%), and safety (43.7%).

Other issues raised:

- Parking capacity, disabled access, preference for free parking, need for secure bike facilities, and improved signage.

Reported barriers:

- Frequency and reliability of buses, site locations, service integration, high combined costs, lack of amenities, safety or security concerns, and awareness/information gaps.

General Challenges & Suggestions:

- While many passengers are broadly satisfied, a significant proportion experience dissatisfaction, with recurring issues related to shelter, real-time information, cleanliness, lighting, physical and digital accessibility, safety, and frequency/integration of services.
- Park & Ride usefulness is limited by service frequency, location, and sometimes inadequate or unclear facilities.
- Improvements suggested by users include:
  - More and better-maintained shelters and amenities.
  - Enhanced live information provision at all access points.
  - Safer, well-lit, and more accessible locations.
  - More frequent and reliable bus/tram connections.
  - Clearer information and signage for users unfamiliar with sites and services.

In summary, high-quality, well-located, safe, and well-equipped stops, stations, and interchanges may be able to make bus services more attractive and accessible, especially for those changing modes or

traveling in less urban areas. Addressing the gaps identified by users could support higher satisfaction and encourage wider bus use.

What do high-quality interchanges and bus stops look like?

Bus Stops

Bus stop environments require different design considerations based on factors such as usage levels, location, and intended roles (e.g., city centres, bus stations, shopping centres, community hubs, residential streets). Recognising these differences is crucial when designing bus stop environments and the facilities they offer. Key topics to consider include:

- Accessibility of stops and ease of boarding and alighting, such as appropriate kerb types and heights.
- Waiting facilities, including shelters and seating.
- Information and communication channels, such as:
  - Posts and flags for visibility and quick reference.
  - Maps and timetables for detailed information.
  - Ticket and fare are information.
  - Real-Time Passenger Information panels.
  - Updates on upcoming and recent service changes.
  - Pointers to external data sources (e.g., call centres, websites, apps) via printed details, NFC tags, QR codes, etc.
- Point of Sales (POS) or Ticket Vending Machine (TVM) options.
- Security features like lighting, emergency communication systems, and CCTV.
- Siting of bus stops to ensure smooth vehicle flow and other measures to enhance vehicle access to stops, including bus boxes, clear approach and exit paths, and bus boarder buildouts.
- Facilities for other modes of transport, like cycle parking.
- Maintenance and cleaning, including resource allocation and execution.
- Engineering aspects such as utilities access and drainage.

Other factors, such as providing the optimal spacing of bus stops to balance stopping times and accessibility to services for users are also important.

Design guidance for the above individual topics is readily available across the UK. However, when it comes to improving quality across an entire network, it is useful to consider the method used in London to ensure network-wide consistency.

Transport for London (TfL) has published standards (see Figure 6 and Figure 7) on various aspects of bus stop design. [20] [21] This guidance emphasises the need to consider the expected usage of a stop to develop appropriate layouts and facilities. For TfL, this consideration is informed by the type of location and the type of movement the bus

[20] TfL, Accessible Bus Stop Design Guidance, 2017

[21] TfL, Bus Stop Graphics Standard, 2021

stop must serve, as outlined in their "Street Types for London" concept. [22]

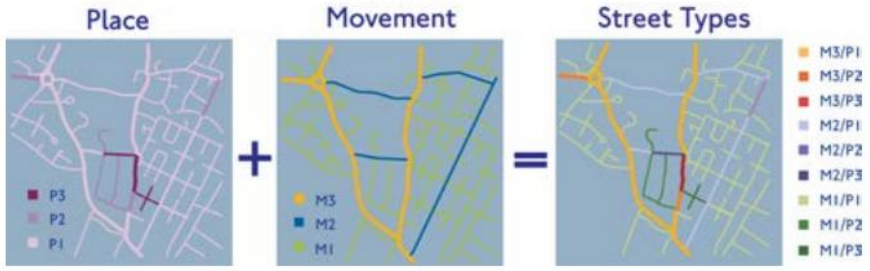


Figure 6. TfL's Street Types for London Concept

For bus stops, this is applied through a design matrix that defines standards based on the Street Type served. For example, bus stops with higher strategic significance for movement and place, such as a city hub, would have different quality standards (e.g. include RTPI panels) compared to stops on streets with local significance, like a residential street with limited through-travel. The TfL design standards also include targets to ensure stops are accessible for vehicles approaching the stop, for the deployment of ramps, and for user access.

[22] TfL, Streetscape Guidance – Fourth Edition, 2019 Revision 1

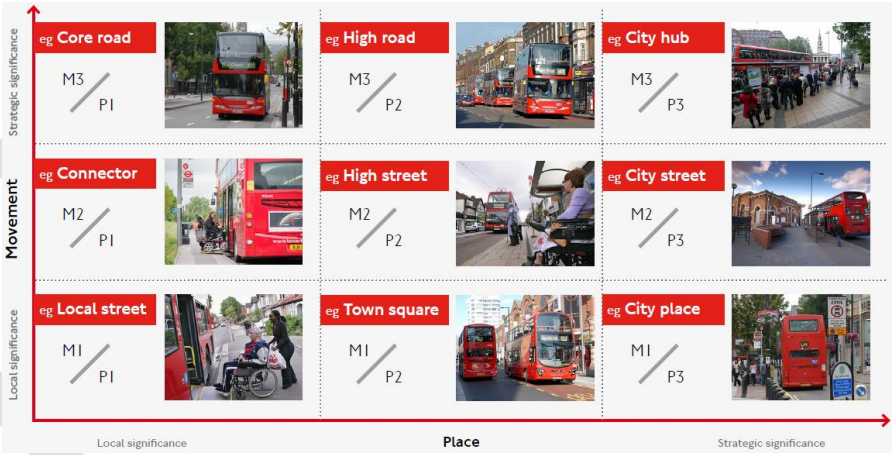


Figure 7. TfL's Street Type Matrix Applied to Bus Stops

Interchange Hubs

SEStran has developed a similar approach to the above for interchange hubs, as outlined in the **SEStran Mobility Hubs Strategic Study**.[23] This sets out a typology for interchange hubs from guidance by CoMoUK and tailored to the local context. This typology considers types of hubs in a range of contexts, from city centre to rural areas. It overlays the type of place, with local geographical factors and trip generators.

These typologies are then used to set out mobility related components and non-mobility related components for different types of hubs, as shown below.

[23] Mobility Hubs Strategic Study | SEStran

Types of Mobility Hubs	Mobility related components	Non-mobility related components
Large interchanges / City hubs 	National & Regional Rail, Regional Bus Public transport (e.g. tram, bus) Car club bays (smaller vehicles) Bike share Taxi, DRT – drop off/pick up – dynamic kerb management Secure bike storage Bike repair stand, bike pump EV charging infrastructure (car clubs and e-bikes) No parking spaces for private cars	Covered waiting areas Digital pillar (Real Time Passenger Information, ticketing, wayfinding, etc) Cash machine Lighting Wi-Fi and phone charging Accessible toilet facilities Urban Realm improvements (e.g. art/planting/parklets) Baggage storage Refreshments – coffee carts, food stalls Vending machines Co-working space CCTV cameras
Transport corridor/ Linking hubs 	Regional rail / Regional bus Public transport (e.g. tram, bus) Car club bays (vans and cars) Taxi, DRT – drop off/pick up – dynamic kerb management Secure bike storage Personal deliveries – package deliveries lockers Bike repair stand, bike pump EV charging infrastructure (public, car clubs and e-bikes) Cargo bike share P&R, car parking spaces	Covered waiting areas Digital pillar (Real Time Passenger Information, ticketing, wayfinding etc) Lighting Urban Realm improvements (e.g. art/planting/parklets) Wi-Fi and phone charging Refreshments – café, food stalls, coffee carts Vending machines Cash Machine CCTV cameras Accessible toilet facilities
Key destinations (business parks, hospitals, etc) 	Public transport (tram, bus, rail) Car club bays (smaller cars) Bike share Taxi, DRT – drop off/pick up – dynamic kerb management Secure bike storage Bike repair stand, bike pump EV charging infrastructure (car clubs and e-bikes) Cargo bike share Personal deliveries – package deliveries lockers Short term car parking Regional Rail	Covered waiting areas Information pillar (Real Time Passenger Information, ticketing, wayfinding etc) – can be digital Lighting Wi-Fi and phone charging Urban Realm improvements (e.g. art/planting/parklets) Refreshments – café, food stalls Vending machines CCTV cameras

Figure 8. Example Extract from the SEStran Mobility Hubs Strategic Study

That study also sets out an approach to implementing common standards for hubs across the area, including pre-planning, planning, implementation, and stakeholder engagement and communications stages of creating a new hub. It also considers a range of potential operational models and partnerships avenues for this, and potential locations for hubs.

SEStran has also published a **Regional Park and Ride Strategic Study** report, setting out recommendations for Park and Ride in the region.[24] The report addresses the strategic placement and accessibility of sites to help reduce congestion. It emphasises the importance of integrating park and ride locations with high-quality, frequent, and efficient public transport routes, as well as promoting multi-modal integration. The study also explores solutions for local parking issues, the potential for bus priority links, supportive policies, and ensuring value for money. Engagement undertaken within the study noted that existing public transport operators face challenges serving Park and Ride sites and that a balance is required between improving existing sites versus providing new facilities.

Additionally, the study suggests developing a 'digital twin' real-time management system for park and ride facilities. This system would monitor usage, identify trends, inform strategic planning, optimise investment decisions, and improve the overall efficiency of the network. The adoption of integrated ticketing systems is also considered to enhance user experience. The study includes both planned and aspirational interventions for new or expanded Park and Ride sites for bus and rail services across the region.

What is the focus of this Strategy?

The SEStran RTS sets out a policy stating that the public transport network should be physically accessible for all including vulnerable groups. This includes stops, interchanges and bus stations, and access routes, and an action was set out to carry out a regional audit to identify those places which do not meet accessibility requirements

[24] Regional Park and Ride Strategic Study | SEStran

and to develop a prioritised list of interventions to address these. It also outlines policies to:

- Enhance Park and Ride provision where required, to enable car journeys to transfer to public transport for at least part of the trip.
- Support behaviour change and the use of more sustainable modes of transport by a combination of enhanced infrastructure, information provision, innovation and measures to discourage car use.

The SEStran RBS focuses on making better use of existing Park and Ride assets, as well as the consistency bus stops and interchanges in relation to raising quality, safety and accessibility standards across the region.

SRBS Policy for Interchanges and Bus Stops

The following policies have been developed under the **Improve Service Quality** core policy area, for **Interchanges and Bus Stops**:

- The Strategy supports greater consistency in the provision of proportionate, high quality, safe and accessible bus stops and interchanges across the region.
- The Strategy supports measures to make better use of existing bus-based Park and Ride assets across the region by addressing the root causes of their poor performance. Sites should also be repurposed / relocated if not performing their intended role and contributing to RTS objectives.

Actions to Deliver the Policies

The following are proposed to support the delivery of the policies:

- Investigate the implementation of an interchange and bus stop typology-based design hierarchy to enable the targeting of appropriate resources, facilities and design standards to deliver consistency across the region.
- Consider the potential for region-wide procurement of bus stops provided, such as those provided by advertising companies, which may offer advantages such as cost efficiencies, improved maintenance, and greater consistency in design and facilities across the region.
- Undertake a critical review of all existing bus-based Park and Rides and consider whether action is required to enhance their effectiveness.

7.6 Safety, Security, and Inclusion

Why are safety, security and inclusion important, and what's the situation in the South-East of Scotland?

The RTS underscores the necessity of creating a transport system that is not only efficient and sustainable but also one that prioritises the well-being of all of its users. Safety, security and inclusivity on the bus network are paramount to fostering an environment where all individuals feel protected and respected, and the RTS highlights an aim to create a transport network that is accessible to all, regardless of their physical abilities or socio-economic status. Furthermore, the RTS recognises the importance of addressing the specific needs of particular groups, including those with protected characteristics. These problems are particularly acute for the most vulnerable groups, including the young, elderly, disabled, women and ethnic minorities.

Bus networks also have a role to play in achieving the target of zero fatalities and serious injuries in road transport by 2050, as outlined in Scotland's Road Safety Framework. This is a policy which is mirrored in the RTS for the region's roads.

Impact Assessment scoping exercises (EqIA; Fairer Scotland Duty; and Child Rights and Welfare) were undertaken for the SRBS Case for Change and the Strategy. These highlighted areas of importance for safety, security, and inclusion:

- Safety and security issues can discourage people from using public transport:
    - Particular areas of concern include when travelling to and waiting at transport stops or stations, particularly in the evening, at unstaffed or isolated locations, and in areas with low lighting.
- According to the Scottish Household Survey, only 68% of individuals feel safe and secure on bus services in the evening. In contrast, 93% feel safe and secure on bus during the day. This national level observation is be supported by local data, with all local authority areas seeing a drop in the perception of safety from day to evening, in particular in Clackmannanshire (98% in daytime to 51% in the evening), Falkirk (96% in daytime to 69% in the evening) and Fife (96% in daytime to 72% in the evening). Only 58% of disabled individuals feel safe on buses at night.
- Pregnant women may have safety concerns about travelling at night or during isolated times of the day and may find it challenging to travel safely during peak hours (Transport Scotland, 2021).
- Issues disproportionately affect women, older adults, younger individuals, LGBTQ+ people, disabled, and Black and minority ethnic groups. Furthermore, experiences of racism, harassment, or past victimisation of hate crimes deter some individuals from using public transport.
- Survey data from 2022 indicates that women and those identifying as trans, non-binary, or another gender are less likely to feel safe using the bus at night and more likely to report never feeling safe compared to men (Transport Scotland, 2022).
- In the UK, 72% of women worry about experiencing sexual harassment on public transport, compared to 40% of men. Consequently, a higher proportion of women (62%) than men

(35%) alter their behaviour to avoid sexual harassment on public transport (UK Government Equalities Office, 2020).

- The quality and maintenance of pavements and footpaths, including routes to public transport, pose problems, especially for older and disabled individuals and those travelling with children in prams and buggies. The RTS highlighted that some public transport facilities in the region are not compliant with the Equality Act 2010, which prohibits discrimination, harassment or victimisation of people who possess a protected characteristic.
- For some groups, language barriers, local dialects, and pronunciation issues can significantly impede the understanding of essential information such as timetables, signage, notifications, origin and destination details, and fare structures. These communication challenges also extend to accessing customer support and providing feedback.
- Accessibility to the public transport network can be a challenge for inclusivity, as noted in Section 5:
    - There are notable disparities across the region regarding access to regular bus services – 4% of households lack access to a bus stop entirely, while 13% of households have bus services less frequently than every 30 minutes. This figure rises to 20% for areas outside of Edinburgh. This limits the use of the bus network by many, including for employment, education, leisure and social activities, especially in more rural areas.
    - Evenings and weekends can be periods of poorer access to bus services in many areas. Additionally, there are communities within the region where high levels of deprivation coincide with inadequate public transport connectivity. This exacerbates the challenges faced by these communities in accessing essential services and opportunities.
- Affordability constraints can significantly limit access to transport services, as discussed in Section 6. The inability to afford transport can stop individuals from accessing essential services, employment, education, and training opportunities. This can reduce quality of life, lead to social isolation, exacerbate health inequalities, and generally contribute to and intensify their experience of poverty and social inequalities.
- The availability of safe, convenient, and cost-effective transport significantly influences the ability of children and young people to access education, public services, and economic opportunities. This impact is particularly pronounced for children from low-income and deprived socio-economic backgrounds (Transport Scotland, 2022). Additionally, children and young people residing in rural areas are generally more reliant on public transport. In these areas, the availability, cost, and frequency of public transport services often pose substantial challenges for young people (Transport Scotland, 2020). As previously noted, there are also variations across the region in the uptake of Young Persons' (Under 22s) Free Bus Travel Scheme.
- Safety of bus passengers and drivers can also impact directly on the operation of bus services themselves, and incidents involving attacks on bus drivers, vehicles and passengers have led to some services across the country being withdrawn or having restricted hours of operation.

Insights for Safety, Security and Inclusion from Our Strategy Survey

Daytime vs Night-time Safety:

- Daytime: A large majority (over 86%) feel safe using the bus during the day. Only a small proportion (under 3%) feel unsafe.
- Night-time: Perceived safety drops sharply after dark—only 46% feel safe, while 15% feel unsafe and over 20% avoid using buses at night. Women and vulnerable groups are particularly affected.

Main Barriers to Feeling Safe:

- Crime & Antisocial Behaviour: Over half (51%) cite fear of crime or disruptive behaviour as a deterrent to bus use.
- Poor Lighting & Isolated Stops: 33% are put off by poor lighting, and 25% cite isolated stops or lack of staff.
- Harassment & Discrimination: 15% have been affected by harassment, discrimination, or hate crime.
- Physical and Environmental Barriers: 7% identify accessibility issues; other concerns include distance to stops, unsafe walking routes, and inadequate shelter or seating.

Direct Experience and Observation:

- About a quarter have witnessed or experienced assault, threats, violence (27%) or harassment/discrimination (26%) on local buses.
- 26% reported issues due to service cuts (cost, frequency, or withdrawals).
- Nearly 10% have faced barriers seeking help or due to step-free/information access.
- 8.5% have experienced or witnessed unwanted sexual behaviour, affecting women and vulnerable passengers most.
- Over a third (38%) have not experienced or witnessed these problems, suggesting issues are widespread but not universal.

Qualitative Themes:

- Accessibility challenges: Step-free access, ramps, and safe walking routes are lacking for some, leading to exclusion.
- Personal safety concerns increase at night or around isolated/poorly lit stops, especially for women.
- Antisocial behaviour is prevalent, including rowdiness, intoxication, vandalism, and bullying—sometimes perceived as associated with free youth travel.
- Cleanliness and comfort: Dirty or poorly maintained buses/stops, overcrowding, and lack of adequate shelter or seating heighten discomfort, particularly for older people or those with additional needs.
- Service gaps in rural areas or at off-peak times further reduce perceived and actual safety and inclusion.

What does a safe, secure and inclusive bus network look like?

A safe, secure and inclusive bus network is foundational to achieving SEStran's vision for bus travel that is accessible, reliable, and welcoming for everyone. Such a network is not simply one free from harm, but one where every user feels genuinely welcome, respected, valued, and empowered to travel with confidence.

The SEStran region's diversity – geographically, socially and economically – means that safety, security and inclusion must be at the heart of network design, operation, and service delivery. Effective delivery requires going beyond compliance with statutory equity and accessibility standards. It means actively listening to the experiences and needs of the most vulnerable groups; tackling the systemic, environmental and attitudinal barriers reported by stakeholders, passengers and non-users; and proactively creating an environment where all feel safe and can participate fully in society.

Drawing on public engagement, impact assessments, and best practice, a safe, secure, and inclusive bus network is characterised by the points below, many of which are tightly related to the other topic areas discussed in this strategy.

Personal Safety for All

- **Safe Vehicles and Infrastructure:** Buses, stops, interchanges, and access routes are designed, maintained, and lit to minimise risk of accident, injury, anti-social behaviour or crime. Design is informed by needs of women, disabled and older users, young people and other groups at greater risk of exclusion or harm.
- **Visible Surveillance and Presence:** CCTV (both on and off bus), good lighting, and (where appropriate) the presence of staff, especially at interchanges and at night, help deter and respond to crime or anti-social behaviour.
- **Zero Tolerance:** The network is managed with a zero-tolerance approach to harassment, discrimination, abuse, or violence—toward either passengers or staff—with clear policies, procedures, and visible public messaging.
- **Attention to All Users:** Recognising that certain groups (e.g. women, disabled people, the elderly, minority ethnic communities, LGBTQ+ individuals, youth) may have specific needs or heightened risks at particular times or locations, and ensuring services adapt accordingly.

Accessible and Inclusive by Design

- **Barrier-Free Access:** Step-free routes, tactile paving, accessible stops/interchanges, low-floor buses with ramps or boarding assistance; accessible information and signage in multiple formats and languages.
- **Inclusive Information:** Real-time and journey information is provided in accessible formats: visual, audio, large print or translated as required, acknowledging sensory, cognitive, linguistic and cultural needs.
- **Extending Support Beyond the Bus:** Safe, well-maintained pavements, crossings and walking/cycling routes to and from bus stops, with attention to rural isolation and evening/weekend service levels.
- **Responsive Service Design:** Routes and schedules reflect the needs of communities at risk of isolation (rural, deprived, young, elderly, disabled, minority ethnic groups), with priority attention given to areas of higher deprivation/transport poverty.

Affordability and Economic Inclusion

- **Fair, Simple Fares:** Affordable and simple fare structures, ensuring those most at risk of financial exclusion can access employment, education, healthcare and social opportunities without being penalised or forced to travel by car.

- **Targeted Support:** Promotion and active support for those eligible for free and discounted travel entitlements, with efforts made to address awareness, application and access barriers.

A Culture of Respect and Empowerment

- **Trained, Compassionate Staff:** All frontline staff are trained to understand and support the needs of diverse groups and to manage, de-escalate, and report incidents of abuse or unacceptable conduct. Drivers are equipped to assist customers with additional support needs.
- **Empowered Customers:** Confidential and accessible reporting channels allow users to feel confident raising concerns about safety or discrimination, and to be sure that incidents will be acted upon.
- **Visible Standards:** Codes of conduct and public campaigns reinforce shared expectations and provide accountability for both passengers and operators.

Partnership and Continual Improvement

- **Community Involvement:** Ongoing partnership working with equality groups, accessibility organisations, young people's forums, minority communities, and local residents ensures ongoing assessment and adaptation.
- **Transparent Monitoring:** Safety and inclusion performance is routinely monitored against clear, public standards – segmented by demographic and geographic group – to ensure progress is visible and inequalities are being addressed.
- **Learning and Adaptation:** Feedback, complaints, and incident data are systematically gathered and used to drive continual improvement, including targeted interventions where problems or gaps are identified.

What is the focus of this Strategy?

Ensuring that the bus network is safe and secure for all was a key aspect of the SEStran RTS and aligns with national to local level transport policy. The RTS set out the need to:

- **Ensure that public transport passengers feel safe at all times**, and suggests measures such as adequate lighting, CCTV surveillance, and the presence of staff. It also includes a zero fatalities and serious injuries target on the region's roads by 2050, and the development and implementation of interventions which reassert public confidence in public transport services.
- **Ensure that public transport network should be physically accessible for all**, including vulnerable groups such as those with disabilities, mobility impairments and the elderly. This requires full compliance with the requirements of the Equality Act 2010. This includes ensuring that buses are equipped with facilities to accommodate wheelchairs and other mobility aids. As noted previously, there is an action to undertake a regional audit to identify stops, stations and interchanges (and access routes) which do not meet accessibility requirements and to develop a prioritised list of interventions in response to this.
- **Handle diverse passenger needs sensitively and effectively**, including providing clear and accessible information about services, offering affordable fare options, training for transport staff, and promoting a culture of respect and understanding.

The SRBS introduces specific policies and actions for safer, more accessible, and inclusive bus travel.

SRBS Policies for Safety, Security and Inclusion

The following policy has been developed under the **Improve Service Quality** core policy area, for **safety, security and inclusion**:

- Deliver a bus network that is safe, secure, and inclusive for all users, prioritising the well-being of vulnerable groups and ensuring accessibility for individuals regardless of any disabilities or socio-economic status.
- Create a zero-tolerance environment for harassment, discrimination or violence on the bus network, including for both bus passengers and drivers.
- Safety by design shall be prioritised and integrated at every stage of the development, maintenance, or enhancement of both new and existing bus services, networks, and facilities.

Actions to Deliver the Policies

Actions will continue to evolve across the Strategy delivery period, aligning with the continual improvement practice set out above. Some initial actions with the potential to help deliver the policies include:

- Ensure there is proactive consultation between SEStran and equality and welfare groups, seeking guidance to ensure effective engagement.
- Ensure there is specialised training across the region for bus drivers to address specific mobility, disability, or information needs, and to develop conflict resolution and de-escalation techniques for safety and security.
- Work with operators and authorities to explore enhanced vehicle standards across the region, improving safety, security, and inclusion. Additionally, collaborate to establish standards for bus stops, stations, and interchanges—such as the integration of audio-visual systems.
- Work with operators and authorities to promote a zero-tolerance approach towards harassment, discrimination, and violence against passengers and bus drivers, for example by:
  - Launching a public awareness campaign to educate passengers about the unacceptability of harassment, discrimination and violence.
  - Implementing a confidential reporting system for passengers to report incidents of harassment or discrimination.
  - Ensuring there is training for bus drivers and staff on recognising and addressing harassment, discrimination and violence.
  - Explore opportunities for collaboration with Police Scotland to ensure action is taken against perpetrators of harassment, discrimination, violence and anti-social behaviour.
- Establish and enhance passenger and driver safety and security reporting systems, enabling the easy reporting of safety and security concerns, suspicious activities, or incidents in real-time, and ensuring prompt responses to such reports.
- Explore the potential for dedicated transport policing services for buses in the region.
- Consider measures such as a “Safe Places” scheme, where key interchanges, stops, and buses (amongst other locations) can offer help if someone is anxious, scared or at risk

while they are out and about and need support. An example of such a scheme is the Safe Places National Network.

- Monitor issues to identify the scale of problems and the responses required, and provide clear performance metrics to regularly assess the effectiveness of safety, security, and inclusivity measures.

7.7 Fleets, Depots and Bus Drivers

Why are fleet, depots and bus drivers important for the bus strategy and what's the situation in the South-East of Scotland?

Fleets and Depots

The quality of the **bus fleet** has a significant influence on service delivery, passenger perceptions, and overall usage of the bus network. Operators must balance the benefits of investing in high-quality, environmentally friendly vehicles against the associated costs. For passengers, factors such as comfort, appropriate facilities, accessibility, and cleanliness are valued. Environmental impacts – both local and global – are also of interest to bus users and the wider community. Government authorities look at how fleet composition supports broader policy goals and initiatives.

Depot facilities are essential for supporting the scale of operations, the variety of vehicles and fuel types in use, and the needs of operational and maintenance staff.

In the SEStran region, **several bus operators have invested in modern, high-quality vehicles** featuring amenities such as Wi-Fi and USB charging points. Some have introduced advanced audio-visual information systems to enhance accessibility and user experience, as well as high-capacity buses—including models with middle doors—to better serve busy routes. The CAVForth autonomous bus project, further exemplifies the commitment to innovation demonstrated in the region

Decarbonisation efforts are also being made, with increasing numbers of electric buses operating in the region, including in the cities of Edinburgh, Dunfermline, and other areas. The establishment of Low Emission Zones (LEZ) in Edinburgh and other central belt cities, such as Dundee and Glasgow, is helping to drive fleet decarbonisation and enforce stricter emissions standards. Electric coach services, such as those operated between Edinburgh and cities like Aberdeen, Dundee, Inverness, Perth, Stirling, and Glasgow, further highlight progress beyond local routes.

Despite this progress, **much of the bus network continues to be operated by diesel buses**, with older and lower-quality vehicles present within fleets across the region. The Scottish Household Survey (2021) reveals **varying passenger perceptions of the bus fleet** across different areas. For instance:

- In Falkirk, approximately 30% of respondents believe their buses are environmentally friendly, compared to over 60% in the City of Edinburgh, East Lothian, and Midlothian.
- Less than 80% of respondents in Falkirk and Clackmannanshire consider their buses to be clean, whereas nearly 100% of respondents in Midlothian and the Scottish Borders hold this view.

The **inconsistency in vehicle quality** is partly due to operators needing to balance **service viability with the costs of maintaining, cleaning, and upgrading fleets**. While high-quality and well-maintained vehicles can drive increased patronage, frequent replacement, upgrading, and cleaning of buses can be financially burdensome. Fleet upgrades take time and usually follow a phased approach, targeting older and more polluting vehicles first. As noted in the SRBS Case for Change, **many parts of the bus network are under commercial pressure**, demonstrated by declining services in some areas. Consequently, some operators may prioritise immediate

pressures of keeping services operating over investing in vehicle quality within their business plans.

Zero-emission vehicles and their associated charging or fuelling infrastructure **are typically more expensive** to acquire than diesel equivalents, although they may **offer lower operational costs**. As such, many of the zero-emission buses introduced in the region have been funded through national grants, such as the Scottish Zero Emission Bus Challenge Fund (ScotZEB). Without such funding, many bus operators in the region may struggle to accelerate the decarbonisation of their fleets. Even when funding is available, not all operators possess the time, resources, and expertise to plan for decarbonisation, assess the feasibility of the transition, and develop a suitable business case or application to access these funds.

Upgrading or constructing new depots to house, maintain, clean, charge, or fuel zero-emission buses can present challenges for some operators. While vehicle technology and ranges can, or will soon, accommodate the majority of bus routes, the capacity of the electric grid and the sourcing of financially viable renewable and low-carbon hydrogen fuel sources may pose barriers to the full decarbonisation of the bus network in the region. **Electric grid capacity varies across the region**. At the time of writing, some areas, such as Fife, are almost entirely categorised as being 'close to their operational limit' by the region's distribution network operator for grid supply points, primary substations, and Extra High Voltage (EHV) circuits. Subsequently, these areas would likely require reinforcement works for connections, such as bus charging stations at depots.

It is recognised that these factors are likely to evolve over the lifespan of this strategy, extending to 2035. However, the current context suggests that **coordinated forward planning will be essential** when considering the extent and phasing of fleet decarbonisation across the region by 2035 and beyond.

Bus Drivers

The **quality of drivers is crucial** to the success of any bus network. As the primary point of contact between bus operators and passengers, drivers serve as the main representatives of the bus network on the road. Their interactions with other members of the public – including other road users, local residents, and visitors – significantly influence the public's perception of the bus network as a whole.

Drivers are accountable for the vehicles they operate, and it is imperative that they **drive in a safe, responsible, and efficient** manner. This approach not only ensures their own safety and that of others but also helps to keep repair, maintenance, and fuel costs at a reasonable level.

Data from Bus Users UK indicates that **22.5% of all issues and complaints** processed in Scotland were related to driver or staff attitudes.[25] This was the most common area of complaint, followed by ticketing matters (15.6%), reliability (11.5%), and bus no-shows (10.9%). Consequently, drivers have a substantial impact on customer

[25] Bus Users UK, Annual Impact Report 2024/25, 2025

satisfaction. The 2023 Transport Focus survey reveals that **87% of bus user respondents** in the SEStran region expressed satisfaction with their drivers. However, **driver shortages** have been identified as a concern for some operators in recent years, as highlighted in the SRBS Case for Change.

Insights for Fleets, Depots and Bus Drivers from Our Strategy Survey

Passenger perceptions of bus vehicle quality and on-board experience are broadly positive but highlight critical areas for improvement:

Overall Bus Quality:

- Most respondents rate local buses highly:
  - 15.1% "Excellent", 42.5% "Good", and 26.4% "Fair".
  - However, 12.5% report "Poor" or "Very poor" quality, highlighting persistent dissatisfaction among a minority.
  - Around 3.5% have no recent experience or are unsure.
- While most are satisfied, there remains a clear need for ongoing investment in modernisation and maintenance, targeting specific concerns.

On-Board Features and Priorities:

- Top priorities for passengers:
  - Clean and well-kept buses (87.8%)
  - Comfortable seating and environment (70.0%)
  - Reliable and efficient operation (65.4%)
  - Other valued features:
    - Live travel information (44.4%), security/safety (42.9%), Wi-Fi/USB charging (26.5%), accessibility (25.7%), and environmental performance (24.0%)

Additional feedback highlights:

- Better air circulation, climate control, interior design, and layout practicalities, especially at peak times.
- Clear signage, pet-friendliness (with clear rules), and locally built buses are also mentioned.

Environmental Impact:

- Most respondents care about greener buses:
  - 26.2% say it's "Very important", 35.4% "Quite important" (over 61% in total).
  - 26.2% are neutral, and around 12% do not see it as important.
- While environmental performance is not the top priority for all users, it is a significant driver of positive perception for a majority and should remain a priority in fleet planning.

Accessibility:

- Accessibility is generally rated well:
  - 38.1% "Good", 11.2% "Excellent", 24.8% "Fair".
  - Still, over 8% rate this as "Poor" or "Very poor".
  - 17.4% are uncertain or haven't recently experienced bus services.

Need for attention:

- Most respondents are broadly content, but gaps exist for those with accessibility challenges—emphasising consistent step-free access, clear information, and space for wheelchairs or buggies.

Recent Changes and Progress:

- There are mixed perceptions of changes:
  - 15.3% observe improvements, while 11.1% note declines.
  - 13.6% have noticed both positive and negative changes.
  - Nearly half (46.8%) report no significant change; 13.2% are unsure.
- Improvements may not be consistent or visible enough across the fleet, and further action is needed to prevent declining standards or increase awareness of ongoing investment.

In summary, cleanliness, comfort, and reliability are the main priorities for passengers, alongside safe, accessible, and modern vehicles. Sustained fleet renewal and consistent quality are important, with an emerging expectation around environmental performance and inclusive design. Addressing the needs of the dissatisfied minority, especially around accessibility and comfort, while making visible improvements could support greater satisfaction and encourage wider bus use.

Survey results clearly show that driver attitude has a significant impact on passenger behaviour:

Impact on Bus Use:

- 12.1% of respondents reported being encouraged to use the bus more due to positive driver interactions.
- 8.5% were discouraged from bus use due to negative experiences.
- 22.6% had both positive and negative experiences influence their bus use at different times.
- 50.6% said driver attitude had no effect on their decisions, and 6.2% were unsure.
- Overall: More than 43% of people were influenced (positively or negatively) by driver attitude.

Passenger Observations and Suggestions:

- Attitude & Service: Many praised drivers for friendliness and helpfulness, while others cited rudeness or impatience. Experiences are inconsistent—most drivers provide excellent service, but a notable minority detract from the journey.
- Accessibility & Inclusivity: Mixed reports on support for disabled, elderly, and non-native speakers. While some received excellent help, others felt rushed, ignored, or unsupported.
- Diversity & Discrimination: A small but worrying number of respondents reported experiencing or witnessing dismissive or discriminatory behaviour.
- Driving Standards & Safety: Concerns about harsh driving, lack of route knowledge, and unsafe boarding/alighting were raised. Some passengers felt unsafe due to driver actions.
- Managing Passenger Behaviour: Drivers face challenges addressing antisocial behaviour and often lack sufficient support.

- Fare & Ticketing Issues: Passengers reported confusion over fares, inconsistent advice, inflexible policies, and a lack of support in the event of service problems or mistakes.

In summary, bus drivers play a pivotal role in passenger satisfaction and trust in the network. Over two in five respondents have changed their travel behaviour due to their experiences with drivers—highlighting the value of ongoing driver training in customer service, accessibility, safety, and support in managing challenging situations. Ensuring consistently positive, inclusive, and safe interactions can enhance the overall quality and perception of bus services.

What does a high-quality bus network look like in relation to bus fleets and depots?

Bus Fleets

Expanding on the section above, the following elements are important for a high-quality bus network in relation to the bus fleet:

- **Accessibility**: Physically accessible vehicles and those with accessible information sources can help make bus services available to a broader range of users, including those with disabilities. While low-floor designs, ramps, and designated spaces for wheelchairs are necessary to comply with legal requirements, accessibility can be promoted through further enhancements such as kneeling buses.
- **Reliability and journey time:** Properly maintained vehicles enhance the reliability of bus services by minimising the risk of breakdowns and delays. Additionally, the availability of spare vehicles ensures contingency cover. Other design features, such as efficient ticketing and payment systems, can expedite the boarding and alighting process and reduce variability in journey times. This is particularly crucial on busy routes, where the time required for each passenger to board, alight, and validate or pay for their ticket can accumulate to a critical point.
- **Environmental impact**: Zero-emission and ultra-low emission vehicles, such as battery electric or hydrogen fuel cell buses, can significantly reduce the environmental impacts of bus services compared to those operating conventional diesel buses, by lowering:
  - Greenhouse gas emissions, which contribute to climate change.
  - Pollutants like nitrogen oxides (NOx) and particulate matter (PM), which contribute to poor air quality and can impact on public health.
  - Noise and vibration pollution.
- **Route appropriateness and passenger facilities:** Different vehicle options can help manage route capacity and the capital and operational costs of delivering bus services.
  - This includes matching vehicle capacity to demand and ensuring that buses are suitable for their physical operating context, such as narrow roads or urban environments. For example, smaller vehicles are often used in Demand-Responsive Transport (DRT) and community transport services, where flexibility and manoeuvrability are essential, but passenger demand can be lower. In contrast, larger buses are generally more suitable for high-demand routes.
  - Matching facilities to purpose is also important to enhance their comfort and convenience. For example, airport services should generally accommodate passenger luggage and provide enhanced information for potential visitors. Coaches

should include facilities such as toilets and space for luggage and bikes, etc. The long-distance coach network in Scotland has seen recent improvements in vehicle quality, aimed at making them comparable to or better than rail or car travel. These improvements have led to increased ridership, even as local bus use has declined in many areas.

  - Additionally, it is important to consider the legislative operating context, such as compliance with LEZ requirements, where adherence to emissions standards is mandatory.

- **Information technology:** Buses operating on routes equipped with RTPI panels must be fitted with compatible technology to interface with these systems. Additionally, other advanced information technologies, such as on-board crowding notification and monitoring systems, can be implemented.
- **Operational efficiency**: Operational costs, including for fuel, maintenance, and repair expenses can be reduced through higher quality vehicle production and the use of electric or more fuel-efficient buses.
- **Safety and security**: As noted elsewhere in this Strategy, technological enhancements, such as driver assistance sensors and cameras, and good design can improve the safety of vehicles for passengers, drivers and other road users. Monitoring and notification systems for security issues, such as anti-social behaviour are also available.
- **A 'Total Transport' approach**: Efficient deployment of vehicles is important. Sharing vehicles among different operators, community transport services, community groups, and government departments (e.g. education, leisure, council services fleet) can help manage costs and maximise utilisation levels. This necessitates the establishment of appropriate sharing agreements and the alignment of operational requirements, such as timing, location, and vehicle specifications, with the intended purpose of the services. Examples of this approach, often referred to as a 'total transport', exist across the UK, and elsewhere.
- **Identity:** As highlighted in the network identity section, the appearance and livery of a vehicle can impact network legibility. Moreover, it can serve as an invaluable tool in demonstrating the cohesion of various elements within the transport network.

Depots

Depots are typically delivered with consideration to the following aspects:

- **Location**: The depot should be situated to provide convenient access for staff, deliveries, and relevant bus services, minimising the dead-running of buses before and after their routes. The location should also take into account the potential disruption to the local area, including increased traffic and noise from vehicles and maintenance activities. However, it is important to note that not all impacts are negative, as the depot can also provide employment opportunities.
- **Facility requirements and space**: The facilities and space required are generally determined by the scale and types of operation that the depot needs to handle, both currently and in the future. These include:
  - Vehicle parking (for buses, delivery vehicles, staff, etc.).
  - Vehicle workshops for maintenance, repair, cleaning.
  - Fuelling/fuel storage and charging stations.

- Safe bus movement areas between these facilities.
- Driver and staff facilities, and administration areas, based on the number and roles of staff present.

- **Decarbonisation needs**: To address energy needs for decarbonisation, it is essential to consider the capacity and connection potential of the electrical grid, as well as sources of hydrogen. This may encompass the potential for on-site generation through renewable energy sources, alongside storage and distribution or delivery mechanisms. Optimising energy requirements within and between depots can significantly influence both the capital expenditure (CapEx) and operational expenditure (OpEx) of depot facilities. It is also important to acknowledge the challenges associated with energy availability in the region.
- **Users, management and ownership**: Depots in Scotland are generally owned and managed by single bus operators. However, depot sharing, and public sector provision of depots are common in many countries. There is a growing emphasis on exploring these practices in certain areas of England and the Strathclyde Partnership for Transport (SPT) region, where franchising and partnership arrangements are being considered or implemented.

Drivers

The role of a **bus driver extends well beyond the physical act of driving**. It also encompasses responsibilities related to health, safety, and security; disabilities and equalities; ticket sales and validation; information dissemination**;** and various aspects of customer service. Consequently, robust driver training standards and performance monitoring are essential components of high-quality transport networks.

Training programmes should include mandatory elements, such as obtaining the Certificate of Professional Competence (CPC) and understanding company policies and codes of conduct. Additionally, they may incorporate **supplementary elements** like eco-driving techniques and advanced passenger interaction skills.

A particularly notable example of effective driver training is the **'My Guide' programme**, developed by Guide Dogs and implemented for bus travel in Brighton and Hove. This practical training equips bus staff with the knowledge, skills, and confidence to safely guide individuals with sight loss. It includes exercises where drivers are blindfolded and asked to board the bus, providing a first-hand understanding of the challenges faced by visually impaired passengers. The training has received positive feedback from drivers themselves.

In addition to maintaining high standards, effective training, and performance monitoring, it is crucial to create an **environment that retains and attracts skilled drivers**, helping to address driver shortages.

Furthermore, regarding the customer service aspect of their role, some operators **allow drivers increased discretion** to resolve issues and improve user satisfaction.

For instance, Trent Barton enables its drivers to provide an '**on-the-spot, no-quibble money-back guarantee'** to passengers who are dissatisfied with their journey, empowering drivers to address concerns promptly and reinforce a positive customer experience.

What is the focus of this Strategy?

For Fleets and Depots, SEStran's RTS outlines policies and actions addressing the following topics:

- Expanding the provision of **buses capable of carrying bicycles** across the region to facilitate more integrated journeys.
- Implementing measures to support the **decarbonisation of the vehicle fleet**, including buses and other modes of transport, in accordance with national requirements. This includes supporting buses that use alternative fuels by actively engaging in and funding pilot projects throughout the region

This RBS will expand on these points, concentrating on the following areas for fleets and depots:

- Establishing **standards/guidance** to enhance the **consistency of vehicle quality** across fixed-route services, and with other delivery models, such as DRT, community transport, and the wider third sector.
- **Aligning vehicle accessibility standards** with on-street infrastructure standards, such as kneel and ramp heights with kerb heights, to improve accessibility across the regional network.
- Implementing additional actions to facilitate the **decarbonisation of the bus fleet**. Amongst others, this will include the development of a **regional decarbonisation plan** that responds to existing and potential future barriers, such as availability of funding sources and the equitable access to these, skills support networks for operators and authorities, regional energy requirements, impacts of energy price volatility, and the specific needs of smaller and medium-sized operators, community transport, and the third sector. Consideration will also be given to **depot requirements and wider decarbonisation infrastructure**, such as shared and/or publicly owned depots and opportunity charging stations.
- Supporting the **coordination and interoperability of shared vehicle technology systems**, including driver communications, ticketing machines, on-board information sources, safety and security measures, and monitoring systems, such as crowding sensors. This will be pursued in alignment with the regional approach outlined in this strategy to improve the quality of information, ticketing and fares, safety, and security, etc.
- Enhancing the **potential for vehicle sharing** to improve fleet utilisation and service viability.
- Exploring the potential for **deliverable vehicle-based improvements to network identity**, as detailed elsewhere in this strategy.

Drivers

SEStran's RTS recognises the central role of bus drivers in delivering a high-quality, accessible, and customer-focused service across the region. This strategy seeks to:

- Promote **ongoing improvement in passenger satisfaction**, with targeted efforts for areas or groups with specific needs.
- Acknowledge and enhance the **ambassadorial role of bus drivers** as public-facing representatives of public transport within their communities.
- Address **driver availability challenges**, supporting recruitment, retention, and training to ensure a stable and skilled workforce.

- Advance a **regional commitment to high-quality standards for bus drivers**, focusing on competencies that deliver safe, inclusive, and efficient service, and thereby enhance customer satisfaction.
- Explore the potential of drivers – alongside other measures – to **help overcome barriers to bus use**, particularly for groups who may face additional challenges accessing public transport (see also Section 7.6 on Safety, Security, and Inclusion).

In addition to training and professional development, the physical working environment is a key factor in attracting and retaining drivers. The provision of high-standard driver amenities, such as welfare facilities at depots and layover points, plays a significant role in supporting driver satisfaction. Ensuring drivers have regular access to hygienic rest areas and toilets helps to reduce fatigue and stress, improving both staff retention and the quality of service delivered to passengers.

This focus demonstrates a commitment to supporting the professional development and well-being of bus drivers as a fundamental part of delivering a resilient and user-friendly bus network.

SRBS Policy for Fleet and Depots

The following policies have been developed under the **Improve Service Quality** core policy area, for **Fleet and Depots**:

- Promote the consistent deployment of high-quality, well-maintained, and appropriate vehicles across all scales of bus operations in the region, including fixed-route services and other delivery models such as Demand Responsive Transport (DRT), community transport, and the wider third sector.
- The Strategy supports greater alignment of vehicle accessibility standards with on-street infrastructure standards, to improve accessibility across the regional network.
- Drive the decarbonisation of the bus fleet at all scales of bus operation in the region. This should focus on planning, coordination, and cooperation between bus operators, government authorities, and key stakeholders to address the funding, energy, skills, and broader resource barriers for upgrading fleets, depots, and the provision of wider supporting infrastructure.
- Support mechanisms for vehicle sharing to improve fleet utilisation and service viability across sectors such as health and social care, education, and community transport.
- Improve passenger satisfaction with bus drivers and address barriers to bus usage by promoting a commitment to high-quality standards at a regional level and facilitating the implementation of measures to achieve these standards.

Actions to Deliver the Policy

The following actions have the proposed to help deliver the policy:

- Engage with key stakeholders in the region to establish standards that enhance the consistency of vehicle quality across all scales of bus operation, including fixed-route services and other delivery models such as DRT, community transport, and the wider third sector.
    - This should consider a typology approach for route types, addressing aspects such as appropriate vehicle size,

capacity, onboard facilities, information technology ticketing systems (and their interoperability), and enhanced accessibility standards.

- For information, ticketing, and payment systems, engage with Transport Scotland regarding their 'Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024'.
- This should also include ensuring alignment of vehicle accessibility standards with on-street infrastructure standards to improve accessibility across the regional network.

- Conduct a comprehensive study to identify the challenges and enablers of decarbonisation within the region, encompassing all scales of bus operation. This study should consider factors such as funding, energy, skills, and broader resource requirements necessary for upgrading fleets, depots, and supporting infrastructure.
  - Include high-level forecasting of potential energy and depot needs for the phased decarbonisation of the bus network. Highlight grid capacity and other energy source issues to be resolved. Engage with Distribution Network Operators (DNOs) and other energy sector stakeholders to consider the potential to accommodate future decarbonisation needs. This may involve exploring cost-effective sources of electricity and hydrogen and harnessing renewable energy and storage solutions to manage supply, demand, and ensure energy resilience.
  - This should include engagement with operators and authorities that have begun decarbonising their fleets and depots, as well as those involved in broader energy innovations. One such innovations is the Levenmouth Energy Park's renewable hydrogen production and use in Fife Council's hydrogen-diesel hybrid refuse collection fleet, local offices, and housing.
- Develop a regional decarbonisation plan for bus fleets, depots and related infrastructure, based on the outcomes of this study.
  - Consider mechanisms for knowledge sharing and support between different bus operators, as well as authorities, to facilitate the exchange of communal experiences in decarbonisation.
  - Consider opportunities for shared and/or public ownership of depots and supporting infrastructure. Note that a Scotland-wide shared charging network is proposed through ScotZEB2; engagement on the scope of this should be undertaken.
  - Consider actions to minimise the impacts of energy cost changes on bus operations, allowing for better forward planning and confidence in fleet decarbonisation proposals.
  - Engage with the national government on potential future funding sources for decarbonisation post-ScotZEB2. Emphasise the importance of an application process that ensures funding reaches the areas and organisations most in need.
- Identify appropriate support mechanisms for vehicle sharing to improve fleet utilisation and service viability across sectors such as health and social care, education, and community transport.
  - Initially engage with local authorities and other stakeholders regarding their studies in this field.
- Engage with bus operators within the SEStran region to address current and future challenges in bus driver recruitment, retention, training, and passenger satisfaction. Identify opportunities for

collaboration and partnership to overcome these challenges across the region. This includes promoting knowledge sharing and other forms of learning between smaller and larger operators, as well as among commercial operators, the third sector, and council operations, where appropriate.

- Work with operators and authorities to review and improve welfare facilities for drivers, including those needed while drivers are on duty and away from the depot. This includes assessing current facilities at depots and on-route locations, identifying priority areas for enhancement, and promoting improvements to support staff well-being, health, and retention.
- Investigate opportunities to establish a set of regional values for quality related to bus drivers, aimed at improving passenger satisfaction and addressing other barriers to bus use. This should include consideration of the means to achieve these values, such as through driver training, technologies, and other forms of assistance.
- Work with and support the activities of the Workforce Mobility Group.
- Seek an update from the Department for Transport to determine the status of their response to the consultation on the Review of the Public Service Vehicles Accessibility Regulations 2000 (PSVAR), which was due to be published in 2024. This will ensure that SEStran remains informed and can further contribute to the development of inclusive and accessible public transport policies.

7.8 Data and Monitoring

Why is this important and what's the situation in the South-East of Scotland?

The collection, monitoring and analysis of data can be key to achieving improvements in quality across many aspects of a bus network. From punctuality and reliability, to travel patterns and customer satisfaction, effective data gathering and analysis can:

- Be used to identify where problems are arising.
- Consider how to improve services to better meet user needs and to grow bus patronage.
- Help monitor performance to ensure that agreed targets are being met.

While data and monitoring are primarily areas of interest for transport planners and operators, government authorities, and other industry stakeholders, they impact the quality and delivery of the bus network, thereby affecting passengers and potential passengers.

What are the main types of data and monitoring practices used in creating a high-quality network?

Timetable and Route Data

Bus timetable and route data can be used for various purposes, including journey planning, service optimisation, and real-time passenger information. Several core sources exist, such as Traveline Scotland, which offer comprehensive datasets on bus routes, timetables, and real-time vehicle locations. Improvements to fares data are also being progressed. Bus operators and third parties also provide or aggregate data on bus services, such as for use in travel planners and commercial bus network analysis tools. These sources aim to collectively ensure that passengers, authorities, and other stakeholders have access to up-to-date information.

Locational Data

A significant majority of buses are now equipped with technology that enables the tracking of their locations as they operate. This data is used to provide live updates to customers, such as real-time expected arrival times at bus stops via mobile applications and at-stop RTPI displays. Additionally, this data is routinely recorded by most bus operators and can be employed in various ways to monitor and enhance performance. In some places, this type of data is available to third parties for purposes such as for use in travel planning apps and websites, in others, this source is carefully managed.

Journey times between stops, arrival and departure times, and average speeds can be analysed over days, weeks, and months to identify bottlenecks in the network where services are regularly delayed or where there is significant variability in journey times. Trends over time can also be reviewed to determine whether conditions and performance are worsening or improving. This analysis can serve as evidence to consider mitigation actions, such as implementing bus priority measures. In situations where immediate changes to network conditions are not possible, the data can be utilised to adjust bus schedules and routes to more accurately reflect current traffic conditions. Detailed data regarding commercial bus services, allowing this scale of analysis, is not typically openly available to government authorities in Scotland. However, instances of data sharing for specific studies and partnership working situations do take place at the discretion of data collectors, typically bus operators.

Patronage and Ticketing Data

Patronage and ticketing data are routinely collected by bus operators to monitor revenue and for audit purposes. However, this is infrequently shared with local authorities and other stakeholders for planning purposes. This data can also be utilised to observe travel patterns and assess demand across a region. At a basic level, it can highlight passenger numbers on specific services and corridors, indicating where adjustments in frequency or vehicle capacity may be necessary. At a more detailed level, ticket data can analyse the origins and sometimes destinations of trips, informing potential service changes, such as the introduction of a direct service for a popular journey that currently requires interchange.

The analysis of origin-destination data can be particularly beneficial for a transport authority, which can use data aggregated from multiple operators to obtain a comprehensive view of the network and to inform tools such as transport planning models (e.g. the SEStran Regional Transport Model). This requires data-sharing and usage agreements, as well as consideration of how data from different systems, potentially in varying formats, might be processed for combined use. Commercial sensitivities can pose challenges in obtaining and utilising this data from commercial bus service operations.

Travel Demand

In addition to data specifically related to bus usage and performance, transport authorities, operators, and planners routinely utilise key sources of demographic, socio-economic, and development information to analyse and forecast travel demand. In recent years, further data sources, such as mobile phone and satellite navigation data, have become valuable for understanding travel demand patterns.

Satisfaction Surveys and User Engagement

Customer satisfaction surveys, engagement with community groups, and other forms of user (and non-user) engagement can significantly enhance bus services and customer satisfaction by providing valuable insights into residents' experiences and expectations. By systematically collecting and analysing feedback, transport operators and authorities can identify areas requiring improvement, such as punctuality, cleanliness, and antisocial behaviour. More detailed engagement can highlight issues such as missing connections and gaps in service.

By gaining direct insights from passengers and combining this with other types of data, targeted interventions can be implemented, ensuring resources are allocated effectively to address specific issues. For example, the Workforce Mobility Project is using demand data from the existing community workforce to identify opportunities with participating employers to provide incentives to employees to use new public transport options.

Additionally, demonstrating responsiveness to passenger concerns can foster trust and loyalty, ultimately leading to higher satisfaction levels and increased patronage. The SRBS Case for Change report highlighted the satisfaction information available for the region.

Travel Planner and App Data

Subject to data protection legislation, data entered by users of operator or authority travel planning tools and apps may be collected and used to improve services. For example, origin-destination intentions can be inferred from usage of journey planner tools. In addition, apps and transport-based accounts can prove a useful way to gather customer satisfaction information.

Other Operator Records

Bus operators keep a variety of further records, such as fuel consumption, vehicle maintenance and driver performance data. This can be used to consider fleet and driver training requirements, and cost-effective operations.

Potential Disruptions

Access to accurate weather forecasts can help in preparing for and mitigating adverse effects on service delivery. Similarly, information about upcoming roadworks, extreme weather, events, and other disruptions can assist operators in responding to circumstances that might impact operations.

The Emergence of Artificial Intelligence

Artificial Intelligence (AI) is emerging as a means to enhance the planning and operation of bus services. AI can leverage large data sources, integrating information from various origins such as GPS, ticketing systems, and passenger feedback. AI has been used to:

- Plan routes efficiently, based on travel demand, traffic data, and other relevant information. Some of the main bus operators in the UK now use AI-powered software to automatically update timetables, with the aims of addressing issues such as bus bunching and poor punctuality.
- Monitor performance metrics to identify areas for improvement and implement data-driven strategies to enhance service quality. Transport for Greater Manchester (TfGM) now uses AI for advanced analytics and simulations to improve bus services on its Bee Network.
- Analyse and optimise driving to reduce fuel consumption and emissions.
- Monitor vehicle performance and predict maintenance needs, thereby minimising breakdowns and service disruptions.
- Improve the accuracy of real-time information by predicting arrival times based on vehicle location and data on operating conditions.
- Provide personalised travel recommendations and updates to passengers based on their travel history and preferences.
- Monitor passenger behaviour through advanced surveillance systems, detecting anomalies and highlighting potential safety and security issues.

National Delivery Strategy

As part of Transport Scotland's *Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024* improvements are proposed for data, in particular in relation to Digital Travel Data Services to improve data standardisation. This also includes a consultation on bus open data legislation and introduction of regulations under Section 40 of the 2019 Act to require bus operators to provide open data on timetables, real-time information, and fares. Additionally, work will commence to push for enhanced data to be provided by operators for National Concessionary Travel Schemes, including boarding and alighting location data.

What is the focus of this Strategy?

The SEStran RBS will prioritise collaboration with key stakeholders to enhance the quality of the bus network through the effective utilisation of data and monitoring practices within the region. Efforts will be directed towards establishing a robust foundation for improved data

collection, management, and usage. Additionally, emphasis will be placed on promoting transparency for users and other stakeholders regarding performance data and monitoring metrics.

Setting the Foundations for Effective Data Use and Monitoring

Improving collection, management, and use of data and monitoring can include the following areas:

- Implement agreements to facilitate data sharing, enabling authorities to aggregate and analyse data from multiple operators. This approach can offer insights into network performance and identify potential improvements at a network level.[26]
- Establish standards for data collection, formats, and sharing to streamline the process and maximise the utility of data available through modern transport systems.
- When data relates to quality targets, it can be useful for authorities to request operators to share these records, either in full or as summary reports, to ensure compliance with the established targets.
- Follow recommendations from Transport Scotland's *Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024* for continuous improvement, by setting out a framework for monitoring smart ticketing and integrated travel initiatives in the region to assess their impact and identify areas for improvement. This evaluation will ensure that the initiatives are meeting their objectives and provide data-driven insights for future enhancements.

Transparency on Performance

Looking at cities with world-class bus networks, some authorities publish reports to the public containing the data they collect from operators. For instance, Transport for London (TfL) publishes an annual report that includes passenger numbers, network capacity, and key performance indicators such as lost kilometres (reliability), and estimated wait times and on-time percentages (punctuality).[27] Similarly, the DfT's Bus Open Data Service (BODS) has enhanced transparency around local bus services in England in recent years, requiring operators to publish historic performance data for punctuality, vehicle location real-time data, timetable data, and fares data.

Opening up these types of data sources to public scrutiny can be an incentive to operators and authorities to improve performance where it is lacking.

[26] Such agreements are more commonly in place in England, with some data being shared as standard nationally, and other data sharing agreements forming part of BSIPs and other Partnership arrangements.

[27] Transport for London, Travel in London – Report 13, 2020

SRBS Policies for Data and Monitoring

The following policy has been developed under the **Improve Service Quality** core policy area, for **data and monitoring**:

- The strategy supports improvements to transport data collection, analysis, sharing, monitoring, and transparency on performance. This will strengthen the use of data and monitoring by key stakeholders and partnerships to improve the performance and quality of the bus network in the region.

Actions to Deliver the Policies

The following actions are proposed to help deliver the policies:

- Engage with Transport Scotland on their 'Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024' on the data aspects of their strategy and set out opportunities for application in the SEStran region. This should include such considerations as:
  - Consulting on legislation under the Transport (Scotland) Act 2019.
  - Data standardisation and interoperability.
  - Collection, utilisation, and transparency, including the potential for open data sharing and the applications of this.
  - Maximising the use of Digital Travel Data Services enhancements to such areas as information, real time updates and disruption alerts.
  - Opportunities around the enhanced Concessionary Travel Scheme data collection and analysis proposals, such as origin and destination data.
  - Continuous improvement of smart ticketing and integrated travel initiatives, including monitoring and evaluation to ensure that the initiatives are meeting their objectives and to provide data-driven insights for future enhancements.
- Undertake a review of data and monitoring in the SEStran region, considering ways to collect, share, analyse, and monitor data to the benefit of the bus network and users, including integration with other modes, where relevant. This should also consider opportunities for specific uses in the region, such as the potential for improving the transparency of bus network performance metrics. The review should also identify mechanisms for actioning improvements, noting the expected need for formal agreements with key stakeholder and partnership working.

7.9 Core Policy Areas – Summary

The sections above have set out the key challenges and opportunities facing the bus network in South-East Scotland, informed by evidence, best practice, and engagement with partners and the public. Three core policy themes have been outlined to guide interventions going forward: level of service, affordability, and service quality.

Level of service policies focus on establishing a regionally equitable network, ensuring that all communities—urban, rural, and everything in between—have appropriate access to bus services that support daily needs, employment, education, and wider opportunities. This takes account of settlement types, frequencies, hours of operation, and links between key centres. Interventions will target areas of highest need, including those at risk of transport poverty, prioritising direct, frequent, and reliable services, complemented by innovative solutions such as DRT where traditional services are unfeasible.

Affordability remains central to an inclusive bus network. The strategy commits to promoting a clearer, more consistent fare structures and access to best-value tickets regardless of operator or mode. It supports ongoing national reform—including the Fair Fares Review and pilots for flat or capped fares—and seeks to remove barriers for those eligible for free or discounted travel. Making bus travel financially competitive with car use is essential to increasing patronage and reducing inequality.

For **service quality**, the strategy addresses the full passenger journey: from reliability and punctuality, integrated and easy to use ticketing, and an improved network identity and information, through to customer service, accessible infrastructure, safety, and inclusion. It recognises the importance of sustained investment in vehicle quality, decarbonisation, and workforce standards. Enhanced data collection, transparency, and passenger engagement also underpin continuous improvement.

Together, these policy themes work in concert to deliver a bus network that is usable, affordable, and attractive for all, supporting the vision for the Strategy. They will require ongoing partnership, innovation, and commitment to deliver lasting benefits across the region.

8. THE ROLE OF GOVERNANCE IN DELIVERY

Introduction

Having set out the SEStran Regional Bus Strategy's vision, objectives, and proposed actions to enhance service levels, affordability, and overall quality across the region's bus network, the next step is to consider the structures and mechanisms necessary for effective delivery. Translating these ambitions into real-world improvements depends not only on robust policies, targeted investment, and strong stakeholder engagement, but also on the governance arrangements that shape how services are funded, managed, and coordinated at national, regional and local levels.

In this section, we explore the evolving governance landscape for bus services—both nationally and within the SEStran area—including the opportunities provided by recent legislative changes and the case for greater regional collaboration. This analysis is critical in identifying how SEStran and its partners overcome longstanding challenges to ensure delivery of a high-quality bus network that meets users' needs now and in the future.

A Changing Landscape for Governance

The delivery of bus services in Scotland is undergoing significant change, shaped by ongoing challenges and opportunities at national, regional, and local levels. The Transport (Scotland) Act 2019 has introduced expanded powers for local transport authorities, opening new avenues for innovation and improvement, but also raising important questions around how these powers should be implemented to best effect. Across the UK, many regional and local transport authorities are now exploring new governance models to respond to changing policy, operational, and funding environments, under the broad banner of greater public control over bus services.

To deliver the vision, objectives, policies and actions of this Bus Strategy, it will be essential to consider the governance opportunities afforded by the Transport (Scotland) Act 2019, as well as wider opportunities afforded by a review of the national, regional, and local split of roles and responsibilities.

Further, consideration must be given to methods of regional collaboration already undertaken by SEStran, and what those examples could suggest as a pathway to further co-working.

Collaborative Working in SEStran

With seven of our local authorities and Dumfries and Galloway Council, SEStran were able to create a governance structure enabling collaboration and effective decision making around EV charging. The collaborative approach grew out of a SEStran-led piece of work to encourage knowledge sharing between the local authorities and creating regional document. This then developed into a second work package which explored whether a collaborative procurement process for a CPO would be beneficial and how this could be done. City of Edinburgh Council are now the lead authority and are progressing the project through procurement and delivery. This facilitation role had several benefits: reduction in workload, economies of scale, and a more equitable network of chargers.

These benefits can also be seen in SEStran's role in developing real time passenger information (RTPI). The support provided has enabled more efficient working and a shared learning environment whilst local authority officers can adapt software to local need.

SEStran continually engage in discussions around the software and opportunities to improve.

The People and Place Programme is delivered across Scotland by Regional Transport Partnerships to deliver a programme of active travel behaviour change projects. We have received consistently positive feedback over the past two years about the value of the regional approach and its ability to support local interventions whilst working towards wider objectives. The fund is focused regional priorities with shared learning embedded in the programme.

The Transport (Scotland) Act 2019

The Transport (Scotland) Act 2019 provides significant new powers for authorities with respect to delivering bus services. These include:

- Authority for local authorities to run their own new bus services, whether directly or via arms-length organisations.
- The ability to create Bus Service Improvement Partnerships (BSIPs), fostering closer collaboration between authorities and operators.
- Provision for authorities to franchise bus services, enabling direct control over such elements as fares, routes and timetable specifications.

Previously, local authorities' control over bus provision was largely limited to subsidised support of uneconomic routes to address gaps in commercial networks. By granting broader operational and strategic capabilities, the Act aims to empower local and regional decision-makers to address persistent deficiencies in the bus network and more effectively meet user needs. While these powers lay crucial foundations, uptake across Scotland has so far been limited, with relatively few authorities taking forward new models of bus operation or partnership at scale. At the time of publication, the most notable exception is Strathclyde Partnership for Transport (SPT), which is actively advancing work in this area. Elsewhere in Scotland, studies and exploratory efforts are ongoing, and some local authorities – such as the Scottish Borders Council and Highland Council – are delivering bus services in-house.

The number of authorities undertaking these options may increase when guidance is further developed by Transport Scotland and tested across the country.

Identified Governance Challenges

Working Group Transport Governance Review, 2019

Transport Governance: A report by a short-life working group looking at the roles and responsibilities of the bodies who run Scotland's transport network (Transport Scotland, July 2019), provided a comprehensive assessment of how Scotland's transport responsibilities are allocated at national, regional, and local level (and how this varies across the country), and the barriers this creates for effective delivery.

The Roles and Responsibilities Working Group was a short-life, collaborative body formed specifically for the National Transport Strategy Review. Its membership comprised representatives from the Society of Local Authority Chief Executives and Senior Managers (SOLACE), Convention of Scottish Local Authorities (COSLA), Scottish

Collaboration of Transportation Specialists (SCOTS) [28], the Regional Transport Partnerships, and Scottish Government officials from the areas of transport, planning, economy, and community planning. The group was supported by external consultants and analysts from Transport Scotland. The breadth of this membership ensured that the group's assessment and recommendations drew from a wide range of government and sector expertise.

The report set out a range of challenges, including:

- Financial constraints limiting investment at a regional and/or local level.
- Lack of support for all transport modes.
- Limited resource capability and skills.
- Difficulties working across boundaries and responsiveness to local needs.
- Disconnect between long-term goals and short-term action.
- Limited local accountability, overall leadership and influence.
- Out-of-date governance arrangements.
- Lack of ongoing maintenance of assets.
- Inconsistent and/or unclear accountabilities.
- Disconnect with Planning, Economic and Health agendas.
- Lack of clarity on roles and responsibilities, particularly for the public.
- Not responsive to local business and private sector opportunities.

The report found that these issues have contributed to a persistent mismatch between aspiration and delivery, especially given Scotland's growing emphasis on environmental, social, and economic imperatives.

In order to address these challenges, the working group suggested a number of potential improvements to transport delivery, including the need to further strengthen regional transport partnerships as key deliverers of change, which was the group's preferred option.

The Potential Value of Changes to Governance in Delivering SEStran's Vision for the Regional Bus Strategy

As highlighted in earlier sections of this Strategy, the SEStran region continues to face persistent challenges in its bus network. User needs are not being fully met across many areas – particularly during off-peak periods and in rural and semi-rural settings – and ongoing budget pressures have led to reductions in both supported services and the commercial network in some places. These developments have, in turn, resulted in widening network gaps, increasing dependence on less sustainable private modes of travel, and created additional barriers to addressing social, economic, and health-based inclusion issues.

Changes to governance could help address these longstanding challenges. For example, adopting a regional governance model could enable local authorities to more effectively pool and supplement

[28] Previously known as the Society of Chief Officers of Transportation in Scotland.

resources and expertise, creating economies of scale. This could support the delivery of cross-boundary routes that are currently unfeasible for a single council or commercial operator, or those that involve complex cost-sharing arrangements. Improved regional coordination and new governance structures could help to stabilise or expand services in areas where the commercial market alone cannot meet demand. Furthermore, this approach could target investment towards areas with the most significant service gaps – such as rural locations or evening services – and allow for swifter, more coordinated responses to service disruptions, changes in demand, or the development of new operator partnerships.

SEStran's Position on Transport Governance

Given the persistent challenges outlined above and the opportunities identified through both the Transport (Scotland) Act 2019 and the Transport Governance Working Group, SEStran has carefully considered its own approach to governance reform. The challenges from the Transport Governance paper are evident in the problems identified in this Bus Strategy's Case for Change, as well as feedback gained from engagement with local authorities, operators, and the public within the region. For example – but not exhaustively – these challenges are readily apparent in several areas:

- Network coverage gaps and declining accessibility in some areas.
- Difficulty funding local authority supported services
- Cross-boundary service challenges that individual local authorities cannot solve alone, given their primary focus on intra-local authority travel.
- The need for stronger integration with economic, planning, and health priorities.

In response to these persistent issues, SEStran supports the general consensus of the Roles and Responsibilities Working Group: a shift towards some form of regional governance model warrants further consideration. SEStran further recognises that while the Transport (Scotland) Act 2019 introduces new powers that present opportunities for change, existing governance structures do not always enable the effective application of these powers where they could bring most benefit.

Crucially, SEStran's position on governance reform and the application of Transport (Scotland) Act 2019 powers is based upon the principle of proportionality: enhanced regional or local powers should only be invoked to the degree necessary to overcome significant barriers to achieving the vision for the Regional Bus Strategy (and Regional Transport Strategy, as appropriate). Collaborative partnership working and engagement remain the default approach, with statutory intervention only considered if market-based or voluntary solutions have proven inadequate.

While this approach may not be universally applicable across Scotland, SEStran's distinctive context – including the presence of a major municipal operator that is partly owned by multiple local authorities, a diverse mix of commercial operators and some supported services – makes a proportional, partnership-led model that builds on these existing foundations particularly well-suited to the region.

Delivering the SEStran Regional Bus Strategy

A Cooperative Foundation
SEStran will put cooperation and engagement at the heart of initial strategy delivery, working with local authorities, public transport

operators, and other stakeholders to shape a better bus network that prioritises user needs.

Supporting Local Authority Efforts

SEStran does not seek to override or overshadow the efforts of individual local authorities to improve transport within their communities. Rather, SEStran's role will focus on those aspects of bus provision and improvement that are inherently regional in nature—facilitating cross-boundary coordination, economies of scale and strategic oversight—and offering support to local authorities where such cooperation is welcomed and adds value.

As an example, supporting bus services currently presents significant challenges for many local authorities. Contracted service costs are rising, and in some areas, a dominant operator faces little or no competition. Limited funding, as well as the need to avoid direct competition with commercial operators, often means that only specific aspects of bus services are supported – for example, evening journeys or certain stops along a route. The Transport (Scotland) Act 2019 has introduced new powers for local authorities, such as including the option to operate their own bus services directly or through arm's-length organisations. While these powers have the potential to create more competition or enable direct operation, many local authorities find it difficult to make use of them in practice, given current resource constraints.

Voluntary Partnership and Evaluating its Success

To deliver on the bus strategy, through voluntary and collaborative means, SEStran look to strengthen cooperation with local authorities to use their available powers under the 2019 Act. This could mean, for example:

- SEStran coordinating or delivering services regionally in partnership with local authorities that lack capacity for independent delivery or that see advantage in a region-led approach, i.e., providing economies of scale.
- Developing joint procurement, marketing, or ticketing agreements to address fragmented service provision and to enable more seamless travel experiences for users across the region.

This approach is not intended to be prescriptive but rather adaptive. SEStran's governance role will evolve based on lessons learned during the early phases of the Regional Bus Strategy's delivery, and as new opportunities or barriers are identified.

If this voluntary route to prove limited in its efficacy, SEStran would consider, in collaboration with its board and eight local authorities, what more radical reform could be considered. Any change will require further investigation, and it is important to acknowledge that previous consultation with local authorities (in 2016-17) surfaced legitimate concerns regarding potential job losses or local funding cuts if SEStran were to transition to a Model 3 RTP governance arrangement. In response, SEStran wishes to make clear that this Strategy does not support measures that would lead to such outcomes. Any new regional roles or functions would be designed to strengthen and augment local capacity—not to replace or reduce existing local functions or staffing. The overarching aim is to enable local authorities to achieve more, by leveraging regional expertise and coordination in a way that supports, rather than undermines, local teams.

SEStran would look to review the efficacy of the voluntary strategy delivery model every three years, in collaboration with partners, including but not limited to; Transport Scotland, local authorities, operators, and our Board.

The Route to Implementation

For each core strategy area - such as network coverage, service quality, user experience, and integration—SEStran will develop a "now to future" scenario, mapping a clear trajectory from the current position toward the desired future state. Initial actions will prioritise partnership working, focusing on collaboration with local authorities, operators, and stakeholders. If significant gaps persist despite these efforts, SEStran will be prepared to consider implementing enhanced powers or adopt new governance models as appropriate to address persistent challenges.

The decision-making process will be fully transparent and will involve ongoing engagement with all relevant partners, ensuring that any changes are evidence-based and supported by those affected.

In conclusion, SEStran's approach to delivering the Regional Bus Strategy is reinforced by both the legislative opportunities provided by the Transport (Scotland) Act 2019 and the insights gained from the Transport Governance Roles and Responsibilities Working Group. The proposed path is both staged and participative: it begins with a commitment to renewed partnership but remains ready to adapt governance arrangements and pragmatically use new legislative powers as required, all with the goal of achieving improved bus outcomes for communities across the region.

APPENDIX A: RELATED VISION, OBJECTIVES, POLICIES AND ACTIONS FROM THE SESTRAN RTS

The vision of the RTS is:

"A South-East of Scotland, fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets."

The RTS objectives are:

- Strategy Objective 1: Transitioning to a sustainable, post-carbon transport system
- Strategy Objective 2: Facilitating healthier travel options
- Strategy Objective 3: Transforming public transport connectivity and access across the region
- Strategy Objective 4: Supporting safe, sustainable and efficient movement of people and freight across the region

The policies and actions from the RTS directly related to Level of Service, Affordability and Quality are set out in the tables below.

Summary of RTS Policies and Actions related to Level of Service

POLICIES	ACTIONS
Level of Service	
• **RTS Policy 8.2e.** Shared mobility solutions should be implemented to provide enhanced access to a wider range of transport options without the requirement for ownership. • **RTS Policy 9.2f.** Service improvements should be implemented in locations identified as at most risk of a combination of transport poverty and deprivation. • **RTS Policy 9.2g.** Bus improvements should support access to healthcare facilities where practical and appropriate.	• **RTS Action 8.3 (6).** Identify locations where implementation of shared mobility solutions could be beneficial and reduce the level of 'forced' car ownership. • **RTS Action 9.3 (1).** Undertake a Regional Bus Connectivity study for non-Edinburgh travel to identify settlement pairs where travel demand is high and bus services are poor, as a means to promoting new routes and connectivity (in partnership with other policies). • **RTS Action 9.3 (4).** Undertake further analysis to develop options to improve bus service connectivity to areas identified as being poorly connected to essential services and suffering from related deprivation. This could include increased service frequencies, new services, more direct

POLICIES	ACTIONS
• **RTS Policy 9.2h.** A core network of rural bus services should be retained wherever practical and feasible within available resource and demand constraints. • **RTS Policy 9.2i.** Demand Responsive Transport should be implemented where traditional scheduled bus services are not feasible particularly in rural and remote areas.	services and / or more express services. This will build upon work undertaken by the Workforce Mobility Project. • **RTS Action 9.3 (5).** Support the delivery of bus services and infrastructure measures which ensure access to healthcare for all. • **RTS Action 9.3 (6).** Work with partners to implement new direct and express services to link settlements across the region that currently require multiple interchanges or excessively long journey times. • **RTS Action 9.3 (7).** Implement the findings of the SEStran Strategic Demand Responsive Transport Study.

Summary of RTS Policies and Actions related to Affordability

POLICIES	ACTIONS
Affordability	
• **RTS Policy 8.2a.** The public transport system should be affordable for all, based on their ability to pay.	• **RTS Action 8.3 (5)**. Resist pressures to increase public transport fares and explore opportunities to provide more affordable public transport for those least able to pay for it.

Summary of RTS Policies and Actions related to Quality

POLICIES	ACTIONS
Reliability and Punctuality	
Bus Priority: • **RTS Policy 9.2a.** Bus priority measures should be implemented to deliver a network of regional, cross-boundary, quality bus corridors that link up key urban centres, building upon existing bus priority measures.	Bus Priority: • **RTS Action 9.3(2).** Undertake a Regional Bus Priority study which will identify regional, cross-boundary, quality bus corridors and key bus priority interventions to reduce bus journey times and improve bus journey time reliability where Edinburgh is likely to be a focus.

POLICIES	ACTIONS
• **RTS Policy 9.2b.** The purpose of bus priority measures should be to provide journey times which are comparable with the car wherever possible. • **RTS Policy 9.2c.** Bus priority should also be designed into major infrastructure and new development schemes. • **RTS Policy 9.2d.** Bus priority measures should be supported by adequate enforcement measures. Road Space Reallocation: • **RTS Policy 11.2a.** The RTS encourages the reallocation of roadspace away from general traffic to specific groups of road users including for public transport and active travel. • **RTS Policy 11.2b.** The principles of the sustainable travel hierarchy should be applied to reprioritise the local and regional road network wherever possible. • **RTS Policy 11.2c.** The sustainable travel hierarchy should be used as a material consideration to prioritise the allocation of roadspace within new developments in the region. • **RTS Policy 11.2d.** SEStran will work with local authority partners to deliver locally and regionally significant roadspace reallocation initiatives. • **RTS Policy 11.2e.** Opportunities to provide roadspace reallocation to support the efficiency of freight movements should be explored where these will not significantly disadvantage public transport users, communities or the environment. BRT/ Mass Transit • **RTS Policy 9.2e.** Consideration should be given to the implementation of BRT on high-demand corridors where sufficient	• **RTS Action 9.3(3).** Deliver the bus priority interventions funded by Transport Scotland's Bus Partnership Fund and subsequently identified by the Regional Bus Priority study. Road Space Reallocation: • **RTS Action 11.3(1)** Develop a framework and set of criteria to assist partners in identifying and delivering local and regional road space reallocation proposals reflecting both urban and rural areas. This should be undertaken in an inclusive way and in line with the NTS2's sustainable travel hierarchy. • **RTS Action 11.3(2)** In collaboration with bus operators, undertake analysis of regional and cross-boundary corridors where congestion is impacting on bus operations and identify locations where roadspace reallocation may be required. • **RTS Action 11.3(3)** Explore the shared use of bus / commercial vehicle lanes through the development and implementation of the SEStran Freight Strategy.

POLICIES	ACTIONS
priority cannot be provided within the constraints of the existing road network.	
Network Identity	
• No specific policies or actions.	
Ticketing	
• **RTS Policy 12.2a.** An integrated ticketing system is supported and should be implemented across all modes of transport in the region. • **RTS Policy 12.2e.** The implementation of a regional MaaS scheme is supported in principle.	• **RTS Action 12.3 (1).** Deliver integrated ticketing systems, potentially incorporating fare capping, which can be used across all modes of public transport and operators, taking into account the digital provision differences in urban and rural areas. • **RTS Action 12.3 (6).** Deliver a regional MaaS pilot scheme with a view towards establishing the long-term viability of MaaS in the region.
Interchanges and Bus Stops	
• **RTS Policy RTS Policy 8.2a.** The public transport network should be physically accessible for all including vulnerable groups such as those with disabilities, mobility impairments and the elderly. This requires full compliance with the requirements of the Equality Act 2010. • **RTS Policy 15.2e.** Park-and-ride provision should be enhanced, where required, to enable car journeys to transfer to public transport for at least part of the trip. • **RTS Policy 15.2f.** Support behaviour change and the use of more sustainable modes of transport by a combination of enhanced infrastructure, information provision, innovation and measures to discourage car use.	• **RTS Action 8.3 (1).** Regional audit to identify stops, stations and interchanges (and access routes) which do not meet accessibility requirements and to develop a prioritised list of interventions.

POLICIES	ACTIONS
Information, Customer Service and Feedback	
• **RTS Policy 8.2b.** Public transport information should be provided in a variety of formats to meet the specific needs of all users. • **RTS Policy 8.2c.** Real Time Passenger Information should be made available for all public transport modes	• **RTS Action 8.3 (2).** Deliver improved public transport information in a variety of formats supported by appropriate wayfinding infrastructure on the transport network. • **RTS Action 8.3 (3).** Introduce Real Time Passenger Information for public transport services through mobile applications, stations, stops and across all parts of the region. • **RTS Action 8.3 (4).** Identify areas of poor digital connectivity where RTPI facilities may be ineffective and work with partners to resolve these issues.
Fleets and Depots	
• **RTS Policy 12.2g.** Opportunities should be sought to expand the provision of bike-buses across the region to facilitate more integrated journeys. • **RTS Policy 13.2a.** The RTS seeks the implementation of measures which facilitate the decarbonisation of the vehicle fleet including cars, buses, vans, trains, ships and aircraft in line with national requirements.	• **RTS Action 12.3 (9).** Work with partners to deliver more buses in the region with the facilities to carry bikes. • **RTS Action 13.3 (7).** Support alternative fuels for modes such as commercial vehicles and buses by actively engaging in and funding pilot projects across the region. •
Bus Drivers	
• **RTS Policy 9.2k.** Opportunities for the more widespread usage of connected autonomous vehicles for the provision of bus services should be kept under review pending the outcome of the CAVForth pilot project	• **RTS Action 9.3 (9).** Review the findings of the CAVForth pilot project and identify whether there are further opportunities for provision of bus services using connected autonomous vehicles in the region.

POLICIES	ACTIONS
Safety, Security, and Inclusivity	
• **RTS Policy 8.2a.** The public transport system should be affordable for all, based on their ability to pay. • **RTS Policy RTS Policy 8.2a.** The public transport network should be physically accessible for all including vulnerable groups such as those with disabilities, mobility impairments and the elderly. This requires full compliance with the requirements of the Equality Act 2010. • **RTS Policy 16.2a.** The RTS supports the implementation of road safety schemes on the regional network targeted at locations of collision clusters and corridors where a consistent and comprehensive approach is required to safety along the entire route. • **RTS Policy 16.2b.** SEStran supports a national review of speed limits, whilst also seeking local amendments to speed limits to improve safety where appropriate. • **RTS Policy 16.2c.** In urban and rural settings 20mph zones, traffic calming and other road safety measures should be used to provide a safe environment for all users of the road network. • **RTS Policy 16.2d.** Automation and innovation should be used to make our roads safer and more efficient by combining the benefits of automated features and capabilities with Intelligent Transport Systems • **RTS Policy 16.2e.** Target zero fatalities and serious injuries on the region's roads by 2050 • **RTS Policy 17.2d.** Measures to rebuild public confidence in public transport to increase the level of use/vitality of services will be supported, providing they maintain consistency with the wider policy set out in the RTS	• **RTS Action 8.3 (1).** Regional audit to identify stops, stations and interchanges (and access routes) which do not meet accessibility requirements and to develop a prioritised list of interventions. • **RTS Action 8.3 (5)**. Resist pressures to increase public transport fares and explore opportunities to provide more affordable public transport for those least able to pay for it. • **RTS Action 16.3 (1).** Identify collision cluster locations for the implementation of road safety schemes. • **RTS Action 16.3 (2).** Develop Route Action Plans for key rural corridors which require a coordinated approach to road safety along their route where there is greater scope for conflict between high-speed through traffic and slow-turning traffic. • **RTS Action 16.3 (3).** Undertake analysis to identify single carriageway routes with high proportions of HGVs and other large vehicles, where the implementation of safe overtaking opportunities may be required to prevent frustration which can lead to unsafe overtaking manoeuvres. • **RTS Action 16.3 (4).** Pursue a national review of speed limits. • **RTS Action 16.3 (5).** Identify locations where local speed limit amendments may be required to improve safety. • **RTS Action 16.3 (6).** Provide supporting infrastructure, including the implementation of Intelligent Transport Systems at appropriate locations across the road network in the region, to enable the safe operation of connected autonomous vehicles. • **RTS Action 17.3 (3).** SEStran will engage with relevant bodies and stakeholders to develop and implement interventions which reassert public confidence in public transport services

POLICIES	ACTIONS
Data and Monitoring	
• No specific policies or actions.	
Customer Charter	
• No specific policies or actions.	

SEStran Regional Bus Strategy – Summary Report

Short SEStran foreword/intro statement on why it's important to SEStran.

Developing the Strategy

The *Towards a World Class Bus Service* paper was presented at the SEStran Partnership Board in June 2023 outlining policy background, the role of buses, ongoing initiatives, and opportunities from the Transport (Scotland) Act 2019. It proposed actions for a world-class service and triggered development of the SEStran Regional Bus Strategy (SRBS). The SRBS also builds on the SEStran 2035 Regional Transport Strategy (RTS), a long-term vision for the region's transport system approved in March 2023.

Summer 2024: Initial Case for Change and Vision presented to SEStran Partnership Board; strategy approved to continue.

Autumn/Winter 2024: Workshops held with local authorities, operators, and SEStran Integrated Mobility Forum to discuss draft policies and actions.

Winter 2024: Strategy reviewed by SEStran Board in meeting and through individual feedback submissions.

Spring 2025: Board and stakeholder feedback integrated into revised draft strategy.

Summer 2025: Public consultation conducted to gather views on user experience and motivations; Over 5,000 responses received.

Winter 2025: Consultation responses analysed and draft updated; further draft shared with authorities and operators for final feedback.

Strategy Finalisation: Final feedback incorporated; strategy prepared for implementation.

The Case for Change

A detailed 'Case for Change' was developed to evaluate the region's current bus network and determine what actions are needed to meet SEStran's RTS commitments. Bus services are essential for connecting people to jobs, education, healthcare, and leisure, especially for those with lower incomes. They also help promote economic inclusion, health, and equality. Challenges in the SEStran region include population growth, rising car ownership, and varied settlement patterns from urban centres to remote rural areas, all of which complicate effective bus service delivery.

Key issues identified include:

- The supply of bus services has decreased since its 2007–08 peak, with bus passenger numbers steadily falling over many decades—even as road and rail use rises. The rate of decline varies regionally: some areas see much lower levels of bus use while Edinburgh's network remains comparatively strong.
- Service provision is uneven, with many routes focused on Edinburgh, while some areas are poorly served or lack service altogether, particularly at certain times of the day or week.
- Network delays, congestion, lack of competition in services and fares, and various passenger barriers—such as expensive and complex ticketing, inconsistent standards, unreliable performance, and limited modal integration—have all undermined the attractiveness of bus travel, reduced passenger confidence, and contributed to negative public perceptions.

Together, these challenges have widened the gap between the current bus network and the high-quality, accessible service envisioned in the RTS.

Vision and Core Policy Areas

To address these issues, the SRBS sets out a vision and a set of core policy areas for the Strategy.

Strategy Vision:	"To provide a high-quality, affordable, accessible, and available bus network for the entire region—one that is fully integrated with other forms of transport and increases both passenger numbers and satisfaction, supporting the social, environmental, and inclusive economic development of the region.

Core Policy Areas:	Improve Level of Service	Improve Affordability	Improve Service Quality

The following sections of the strategy detail these policy areas, review the current conditions, and outline steps toward achieving a consistently high-quality bus network that meets the needs of the region.

Core Policy Area: Improve Level of Service

Why is this important, and what is the situation in the South-East of Scotland?

Although policies support less car use and more public transport, bus use in South-East Scotland has dropped, mirroring national trends. The Case for Change report links this decline to fewer services—reduced coverage, operating hours, and frequency—which makes buses less attractive and accessible. Improving supply and demand is essential to meet regional goals.

What does a high-quality level of service look like?

A strong bus network offers easy travel with full coverage across areas and times. Once basic connectivity is achieved, comfort, reliability, and quick trips become key.

What is the focus of our Strategy?

The SRBS aims to address bus service decline by setting clear principles to ensure services operate where, when, and as often as needed, helping more people to use buses. The Case for Change identified several pressing issues to be addressed:

- **Edinburgh-centric network:** Most regional bus services focus on Edinburgh, with limited links between other local authorities despite most car journeys not involving the city.
- **Rural vulnerability and inequality:** Many deprived and rural communities face poor public transport or depend on subsidised routes that are increasingly at risk from rising costs and reduced budgets. This limits access to jobs, education, and healthcare, and deepens inequality.
- **Difficult and time-consuming journeys:** Bus journeys are often two to three times longer than by car and can involve changing buses, uncertain connections, accessibility challenges, and extra costs.

Without intervention, shrinking networks could worsen regional inequity and transport poverty, entrench car dependence, and cause some local services to disappear entirely.

SRBS Policy to Improve Level of Service

The following policy has been developed for the SRBS:

- Move towards a regionally equitable level of service in terms of connectivity by settlement type, including travel between key towns in near-neighbour local authorities. This will need to recognise the resource limitations of local authorities, while accounting for the specific needs of communities.

The Concept of Providing a Regionally Equitable Level of Service: A regionally equitable level of service means that every settlement in the SEStran region should benefit from a core standard of public transport connectivity appropriate to its size and needs, with these standards regularly reviewed to reflect changes in demand, travel patterns, and resources. While rural hamlets and villages could have links to small towns or urban centres for essential access, small towns could be connected to urban centres, and these in turn interconnected. In the largest cities, key corridors could provide frequent, 'turn up and go' services. In areas with geographic constraints or low population density, flexible solutions such as Demand Responsive Transport (DRT) may be necessary to ensure adequate access.

Core Policy Area: Improve Affordability

Why is this important, and what is the situation in the South-East of Scotland?

Affordable bus travel is essential for accessibility, reducing inequalities, boosting ridership, driving economic growth, and promoting a shift from car use to address climate change. In South-East Scotland, high costs and limited uptake of concessionary schemes present challenges—while 83% of young people in Edinburgh use free bus travel, only 41% do so in Falkirk and Clackmannanshire.

Perceptions of value also differ; over 80% of users in Midlothian and West Lothian see fares as fair, but less than 50% agree in the Scottish Borders and Falkirk. These differences risk deepening socio-economic divides, especially for deprived communities most dependent on buses.

What does an affordable bus network look like?

The Scottish Government's Fair Fares Review aims to make public transport more affordable and accessible. Key short-term actions include piloting area-based flat bus fares or reduced zonal integrated fares. For the medium to long term, the review recommends governance reforms, integrated national and regional ticketing and fare structures, addressing the high relative cost of public transport, and improving network stability. It also stresses the importance of maintaining concessionary travel schemes and exploring options for a national or multimodal travel scheme. These measures focus on increasing bus use and making public transport a more attractive choice.

What is the focus of our Strategy?

The SRBS aims to build on RTS policies that stress affordability for all. A core focus is ensuring regionally important journeys are viable by simplifying complex fare structures, especially for those that require multi-operator and multi-modal travel, and those least able to pay. Our survey feedback also supported prioritising fair fare structures, automatic best-value pricing, and accessible ticket purchase and fares information.

SRBS Policy to Improve Affordability

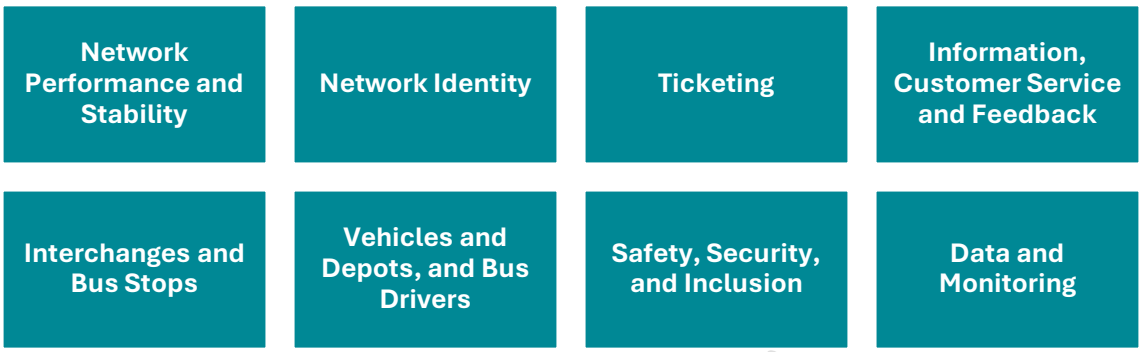
The following policies have been developed for the SRBS:

- Fares and ticketing should be straightforward to understand, easily accessible, and ensure all users can identify and obtain the best value fare for their journey, regardless of interchanging between services, operators, or modes.
- The Strategy supports greater consistency of fares and approaches to fares setting across the region.
- The Strategy supports initiatives to provide free or lower cost bus travel for those in 'transport poverty'.
- Ensure that concessionary fare schemes are equitable for both operators and eligible passengers, and that resources are targeted and allocated appropriately to ensure support is directed where it is most needed.
- The Strategy supports measures to improve the competitiveness of sustainable transport affordability relative to car use and parking fees.

Core Policy Area: Improve Service Quality

The SRBS Case for Change highlights the urgent need to improve the quality and consistency of bus services in the SEStran region, emphasised by falling passenger numbers and declining satisfaction. Improving these aspects is critical for attracting new users and enabling operators, authorities, and stakeholders to deliver better services.

The figure below outlines the key elements required to improve the quality of the bus network across the region. Each element is discussed in more detail in the following sections.



Network Performance and Stability

Why is this important, and what is the situation in the South-East of Scotland?

Journey times, reliability, and punctuality are essential for a successful bus network. Services need to run quickly and on time, minimising cancellations or early finishes. While operators manage issues like driver absences and vehicle breakdowns, external factors such as congestion and road incidents frequently cause delays and raise costs, affecting network affordability.

Congestion, especially in Edinburgh and other cities, leads to slower, less predictable journeys. Passengers often complain about slow, indirect routes and request faster travel and better bus priority. Poor performance reduces confidence and pushes people towards other transport modes, particularly disadvantaging those reliant on buses for essential trips (e.g., children, older or disabled people, and those on low incomes).

Satisfaction with punctuality and reliability is inconsistent—ranging from 88–90% in Edinburgh, Fife, and Midlothian, to 65–70% in Clackmannanshire and Falkirk. Frequent, poorly communicated service changes also contribute to user dissatisfaction.

What does a high-quality bus network look like for network performance?

Achieving strong bus **network performance** relies on:

- Prioritising buses over cars to reduce congestion and enable predictable journey times.
- Integrating bus services with other transport modes, boosting service frequency, and providing alternatives like a ‘last bus guarantee’ to enhance passenger confidence and resilience.
- Quick incident response and robust enforcement of road rules, supported by cooperation between operators and authorities.
- Maintaining a well-serviced fleet and sufficient, trained drivers to ensure reliable, timely services.

Ensuring bus **network stability** depends on developing long-term, objective-led plans that incorporate forecasts for transport demand, land use, and economic trends. Nevertheless, external pressures like variable funding, evolving demand, and temporary disruptions (e.g., roadworks) often require service adjustments. To enhance stability, it is important to:

- Establish clear standards for managing changes, including consultation and transparent communication with authorities and passengers.

- Secure long-term, multi-year funding to support initiatives and avoid “funding cliff-edges” that threaten essential services.
- Minimise the frequency and scale of service changes by using fixed timetable and route change dates, allowing for better planning and communication.
- Carry out thorough consultations with communities and key stakeholders—especially those most reliant on bus services—to ensure changes are well-informed.
- Coordinate closely between bus operators, local authorities, and traffic management teams to limit disruption and provide timely, accurate information.
- Communicate changes clearly via targeted messaging, accessible channels, and consistent data sharing to maintain public confidence and protect vulnerable users.

Supporting these efforts, Section 39 of the Transport (Scotland) Act 2019 empowers authorities to request essential service data from operators, providing the evidence needed to manage network stability and consider targeted interventions or subsidies. In addition, the adoption of advanced technology, such as AI and analytics, is enabling operators and authorities to better optimise timetables, improve reliability, and respond proactively to incidents—driving continuous improvement in network performance and stability.

What is the focus of our Strategy?

The SRBS aims to address problems caused by increased car use, which can slow buses and reduce their reliability, as highlighted in the National Transport Strategy 2. It supports the SEStran RTS, focusing on high-quality cross-regional corridors, bus priority in new infrastructure, and making bus travel faster than driving. The strategy includes possible Bus Rapid Transit, strict enforcement of priority measures, and reallocating road space to sustainable travel. Additional goals are better vehicle reliability, driver support, responsive incident management, and ongoing network review for stability and user trust.

SRBS Policy to improve Network Performance

The following policies have been developed for the SRBS:

- Progress the policies and actions set out in the RTS related to bus priority, road space reallocation, and bus rapid transit to reduce bus journey times and improve bus journey time reliability.
- Support a balanced approach to road space reallocation between bus and active travel schemes, as well as an increased role for bus operators in the development of road space reallocation proposals.
- Improve the performance of bus services for key regional movements and across the region in relation to reliability and punctuality by enhancing vehicle reliability, vehicle and driver availability, improving the resilience of the bus network, and by prioritising consistent bus journey times.
- Support measures to reduce car use to protect and improve bus journey times and reduce journey time variability to deliver an attractive and efficient bus network which promotes passenger growth.

- Improve the stability of the bus network by exploring enhanced processes relating to longer-term funding settlements and service guarantees, changes of service, to reduce impact on users, and improve consultation, communication and information-sharing with key stakeholders.

Ticketing

Why is this important, and what is the situation in the South-East of Scotland?

Integrated ticketing is essential for simple, affordable public transport and supports connections between buses and other modes, as emphasized by SEStran's RTS and Scotland's STPR2. In South-East Scotland, tickets are mostly limited to single operators, and multi-operator options are not widely available. While more people use contactless and smartcards here than elsewhere in Scotland, systems like *TapTapCap* that offer automatic fare capping across different operators are uncommon. This fragmented approach creates barriers for new or infrequent users of public transport.

What does high-quality Ticketing look like?

A high-quality ticketing system is based on three core principles:

- **Simplicity:** Ticket choices and purchases should be easy to navigate. Formats must suit all users, with pre-purchase options to reduce time spent buying tickets on vehicles.
- **Flexibility:** Users should be able to travel easily across different operators, transport modes, and areas.
- **Value and Affordability:** Flexible ticketing must offer value for money without significant cost premiums, be affordable compared to car travel, and provide access to free or reduced fares where eligible.

Region-wide ticketing delivers clear benefits across the UK. Systems like Transport for London's Contactless and Oyster offer smart payment, fare caps, and flexible trip options. Cities such as Liverpool, the West Midlands, and Greater Manchester also use integrated smartcards and multi-mode travel, simplifying journeys and lowering costs.

Transport Scotland's *Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024* outlines a decade-long plan for integrated ticketing, supported by NSTAB. The strategy emphasizes accessibility, interoperability, and value for money. Together with the Transport (Scotland) Act 2019, it enhances local transport authorities' powers, promoting collaborative development of ticketing schemes under a unified national framework.

What is the focus of our Strategy?

The SRBS aims to address key ticketing challenges by prioritising integrated solutions for public transport and mixed-mode journeys throughout the region. A primary objective is to enable seamless travel across all modes and operators. As a regional partnership, SEStran is well placed to lead and coordinate these efforts.

SRBS Policy to Improve Ticketing

The following policies have been developed for the SRBS:

- Progress the policies and actions set out in the RTS related to integrated ticketing.
- Encourage a ticketing system that instils the principles of simplicity, flexibility, value and affordability for users. This should include addressing challenges for cross-boundary and regional movements, alongside a promotion of the same values at a local level.
- Work towards a fully integrated multimodal ticketing system with fair and transparent operator revenue apportionment arrangements.

Network Identity

Why is this important, and what is the situation in the South-East of Scotland?

A clear bus network identity helps users navigate complex transport systems by indicating which vehicles, tickets, information, and infrastructure are part of a unified service. Effective branding simplifies travel, especially where multiple operators and fare structures create confusion.

The SEStran region lacks this common identity; instead, passengers face a mix of separate brands that reflect fragmented management and poor integration.

What does high-quality Network Identity look like?

Network identity refers to the consistent presentation of bus services—through information at stops, vehicles, online channels, staff uniforms, and ticketing—to help passengers easily recognise and use the network. The level of common branding varies by region, shaped by service integration, infrastructure, and operational models. Effective network identity relies on real integration of these elements. In countries like the Netherlands, well-integrated tickets and systems can make distinct network branding less important, as users expect seamless service.

What is the focus of our Strategy?

Within the SEStran region, bus services exhibit distinct identities across different operators, local authorities, and demand catchments around key centres. Beyond branding, there is significant variation in tickets, fares, and information.

Therefore, it is important to acknowledge that the region is far from having a unified network identity or the necessary enablers. The SRBS focuses on outlining the policies and actions to begin exploring a regional identity for buses and other sustainable modes, considering user benefits, appropriate geography, stakeholder appetite, required changes, feasibility, resources, and leadership.

SRBS Policies to Improve Network Identity

The following policies have been developed for the SRBS:

- Promote a positive, recognisable, and trusted bus network identity across the region, delivering improved consistency for users in identifying and engaging with information, ticketing, bus stops, interchanges, vehicles, and other key network assets. The strategy recognises that unified branding may not always be practical or

necessary, and will prioritise measures that deliver clear benefits to users while acknowledging operational challenges.

- Enhance the integration of bus network identity with those of other transport modes to present a cohesive and user-focused public transport system.

Information, Customer Service, and Feedback

Why is this important, and what is the situation in the South-East of Scotland?

Accessible and clear **travel information** is crucial for users to make informed choices about services, schedules, costs, and disruptions. Without it, people may avoid buses or other sustainable transport, especially those with mobility challenges, young people, and individuals facing social deprivation. The SEStran RTS highlights confusing information and low public transport awareness as major issues.

Strong **customer service and feedback** systems are needed for addressing travel problems and improving future service. In the SEStran region, these are managed by individual bus operators, resulting in inconsistent quality.

Customer charters set standards and bolster trust. However, most SEStran bus operators have separate charters, making it difficult for passengers using multiple services to understand varying commitments.

What does a high-quality Information, Customer Service, and Feedback look like?

High-quality **information and customer service** are fundamental for a successful, accessible bus network. To meet the needs of all users, including those less comfortable with digital tools, transport providers should:

- Ensure reliable, inclusive information:
    - Offer real-time journey planners, accurate timetables, maps, and announcements, both digitally and in physical formats.
    - Use clear language, inclusive icons, and provide translation services, addressing barriers for those with disabilities, language needs, or limited experience.
    - Keep all information current and consistent through robust data standards and coordination.
    - Support additional needs with initiatives like the Thistle Assistance Card and app for discreet assistance.
- Integrate and simplify: Present service options and fares in a clear, comparable way, minimising information overload.
- Drive continuous improvement: Encourage regular user feedback, prioritise responsive customer service, and engage underrepresented groups in decision-making.

A **customer charter** sets service standards, accessibility rules, safety procedures, fare policies, and support guidelines for bus networks. It covers communication, complaints, refunds, and vehicle requirements, with performance goals to ensure fair service.

Collaboration among operators, stakeholders, and passengers is essential. Ongoing feedback and regular reviews help keep the charter current and improve equity in bus services.

What is the focus of our Strategy?

The SRBS aims to improve public transport by offering accessible information and Real Time Passenger Information (RTPI) across all modes and locations. The strategy prioritises better customer service, enhanced information, and feedback, with a strong emphasis on accessibility and seamless travel, supporting initiatives like Thistle Assistance.

Although a region-wide customer charter is recognised as beneficial, differing service levels and resources make its immediate introduction impractical. SEStran is engaging stakeholders to assess the charter's potential while initially working to improve integration and users' travel experience.

SRBS Policy to Improve Information, Customer Service, and Feedback

The following policies have been developed for the SRBS:

- Progress the policies and actions from the RTS to ensure public transport information is available in a variety of accessible formats, supported by appropriate wayfinding across the network, and making improvements to real time passenger information availability and effectiveness.
- Promote a seamless and high-quality user experience for information provision, customer service, and user feedback across all stages of travel, including pre-journey planning, at the bus stop, on-board, and after travel is completed.
- Work towards the development of a region-wide Customer Charter in the long term, setting out the standards of service quality that users can expect when using the bus network.

Interchanges and Bus Stops

Why is this important, and what is the situation in the South-East of Scotland?

Interchanges like bus stations and stops are vital for passenger boarding, transfers, and connections to other transport modes. Good facilities improve travel, attract new riders, and support efficient operations.

In the SEStran region, only half of households outside Edinburgh have direct city services, with even fewer links to other major centres. Transfer satisfaction varies widely, highlighting access challenges. Park and Ride sites and mobility hubs help reduce congestion, connect car and active travel to public transport, and offer services like EV charging to support decarbonisation.

Core benefits of high-quality interchanges include:

- **Reduced congestion:** By intercepting car journeys at the edge of cities, these sites ease traffic in central areas and free space for bus priority or active travel measures.
- **Improved accessibility:** Suburban and rural users gain easier, more reliable access to city centres and regional destinations.

- **Faster journeys:** Bus priority infrastructure and streamlined boarding at interchanges help reduce travel times and improve punctuality.
- **Cost and environmental savings:** Shifting trips to public transport lowers personal travel costs and cuts emissions.
- **Increased ridership:** Enhanced connectivity supports higher service frequencies, benefiting the whole network.

However, challenges persist:

- Limited funding and resources for building and maintaining facilities.
- Variation in quality and ownership affecting confidence and flexibility.
- Balancing strategic locations, integration, and optimal use—some sites are not ideally placed or fully used.
- Trade-offs between direct express routes and those stopping at more interchanges.

Investment in modern, accessible, and well-integrated interchanges across the SEStran region is essential to delivering an attractive, equitable, and sustainable bus network.

What do high-quality Interchanges and Bus Stops look like?

High-quality bus stops and interchanges require accessible boarding, suitable shelters and seating, clear signage, real-time updates, ticketing, strong security, efficient layouts, cycle parking, reliable maintenance, and robust infrastructure. Interchange hubs combine bus, rail, cycling, and active travel options, sometimes offering Park and Ride or Mobility Hub services. SEStran recommends context-based hub types, standardised designs, multi-modal integration, and frequent public transport connections. Strategic studies also call for digital management, integrated ticketing, and stakeholder engagement to ensure consistent facilities across the region.

What is the focus of our Strategy?

The SEStran RTS sets out a policy that the public transport network should be physically accessible for all, including vulnerable groups. This covers stops, interchanges, bus stations, and access routes, with an action to conduct a regional audit identifying locations that do not meet accessibility requirements and creating a prioritised intervention list. Policies also include enhancing Park and Ride provision where needed to allow car journeys to transfer to public transport, and supporting behaviour change towards sustainable transport through improved infrastructure, information, innovation, and discouraging car use.

This SEStran RBS supports this by focusing on better use of existing Park and Ride assets, and improving the consistency, quality, safety, and accessibility of bus stops and interchanges across the region.

SRBS Policy to Improve Interchanges and Bus Stops

The following policies have been developed for the SRBS:

- The Strategy supports greater consistency in the provision of proportionate, high quality, safe and accessible bus stops and interchanges across the region.

- The Strategy supports measures to make better use of existing bus-based Park and Ride assets across the region by addressing the root causes of their poor performance. Sites should also be repurposed / relocated if not performing their intended role and contributing to RTS objectives.

Safety, Security, and Inclusion

Why is this important, and what is the situation in the South-East of Scotland?

The RTS highlights the need for a transport system that ensures safety, security, and inclusion for all users, especially vulnerable groups. Bus networks are essential to Scotland's goal of zero road fatalities and serious injuries by 2050. Assessments such as EqIA, Fairer Scotland Duty, and Child Rights and Welfare informed the SRBS Case for Change and this Strategy, identifying key concerns around safety, security, and inclusion.

Safety concerns reduce bus usage, especially at night in unstaffed or poorly lit areas. Only 68% of people in Scotland feel safe on evening buses, and just 58% of disabled passengers share that sentiment. Incidents have led to fewer services.

Barriers for vulnerable groups are substantial; women, older adults, young people, LGBTQ+ individuals, disabled people, and ethnic minorities face greater challenges. Harassment and hate crimes deter use, with 72% of women fearing sexual harassment, and many changing their routines for safety. Women and non-binary people feel less safe than men at night.

Physical accessibility is limited by inadequate pavements and footpaths, and lack of compliance with the Equality Act 2010, especially for those with mobility issues.

Information and support accessibility suffer due to language barriers and unclear signage.

Service gaps persist: 4% of households lack a nearby bus stop, 13% have infrequent service (rising to 20% outside Edinburgh), and evening/weekend options are worse in deprived or rural areas.

Affordability issues limit access, contributing to isolation and poorer health.

What does a safe, secure and inclusive bus network look like?

A safe, secure, and inclusive bus network not only prevents harm but ensures every user feels welcome, respected, and able to travel confidently. Drawing on public engagement, impact assessments and best practice, crucial features include:

- **Personal Safety for All:** Buses, stops, and access routes are well-designed, maintained and well-lit, with CCTV and staff presence (especially at interchanges and at night) to minimise accidents, deter crime, and address anti-social behaviour. Zero tolerance for harassment, discrimination, or violence is reinforced by clear policies and messaging, with adaptable services addressing heightened risks faced by vulnerable groups.
- **Accessible and Inclusive by Design:** Step-free, accessible routes and stops, low-floor buses, and clear information/signage in multiple formats (visual, audio, large print, multiple languages) are prioritised. Safe, well-maintained access to and from bus stops is provided, with routes and schedules tailored to rural, off-peak, isolated, and deprived communities.

- **Affordability and Economic Inclusion:** Simple, affordable fares ensure access to essential services, with well-promoted free or discounted travel and support for financially vulnerable groups.
- **Culture of Respect and Empowerment:** Staff are fully trained to support diverse needs, manage incidents, and uphold codes of conduct. Confidential channels allow users to report safety or discrimination concerns, reinforced by awareness campaigns for all.
- **Partnership and Continual Improvement:** Ongoing collaboration with equality groups and communities ensures safety and inclusion are monitored, publicly reported, and continually improved based on user feedback and incident analysis.

What is the focus of our Strategy?

Ensuring the bus network is safe and secure for all is a fundamental aspect of the SEStran RTS, aligning with policies at all government levels. Key priorities include:

- Ensure passengers always feel safe through adequate lighting, CCTV, staff, a zero fatalities target by 2050, and interventions to reassert public confidence.
- Full physical accessibility for all by complying with the Equality Act 2010, and auditing stops and routes for improvements.
- Address diverse needs by providing clear information, affordable fares, trained staff, and promoting respect and inclusion.

The SRBS introduces specific policies and actions for safer, more accessible, and inclusive bus travel.

SRBS Policies to Improve Safety, Security, and Inclusion

The following policies have been developed for the SRBS:

- Deliver a bus network that is safe, secure, and inclusive for all users, prioritising the well-being of vulnerable groups and ensuring accessibility for individuals regardless of any disabilities or socio-economic status.
- Create a zero-tolerance environment for harassment, discrimination or violence on the bus network, including for both bus passengers and drivers.
- Safety by design shall be prioritised and integrated at every stage of the development, maintenance, or enhancement of both new and existing bus services, networks, and facilities.

Fleets, Depots and Bus Drivers

Why is this important, and what is the situation in the South-East of Scotland?

In the SEStran region, the quality of buses, adequacy of depots, and professionalism of drivers are essential for a dependable public transport network. **Vehicles** influence comfort, accessibility, and environmental impact, while **depots** support efficient operations and enable future zero-emission transitions. **Bus drivers** significantly affect passenger perceptions of safety and service.

Operators have enhanced fleets with modern amenities such as Wi-Fi and USB charging, added high-capacity buses on busy routes, and introduced electric and autonomous buses. However, many buses are still diesel-powered, and fleet standards vary; for instance, only 30% of Falkirk passengers see their buses as environmentally friendly, compared to over 60% in Edinburgh and East Lothian. Cleanliness ratings also differ widely across the region.

These disparities are linked to operators prioritising immediate operational needs over upgrades due to costs, with fleet improvements phased in gradually. Transitioning to zero-emission fleets and upgrading depots is costly and depends on grants like ScotZEB, with additional challenges like grid limitations in some areas.

While driver behaviour generates most complaints (22.5%) in Scotland, overall satisfaction in SEStran is high (87% in 2023). Nonetheless, driver shortages continue to pose reliability issues.

What Does a High-Quality Bus Network Look Like?

A high-quality bus network in the SEStran region relies on modern fleets, effective depots, and skilled drivers.

Key elements of a successful and user-friendly **fleet** include:

- Accessible designs: low floors, ramps, wheelchair spaces, kneeling buses.
- Audio-visual and onboard technology for a better passenger experience.
- Reliable, well-maintained fleets with spare vehicles.
- Zero- or low-emission buses to reduce pollution and meet LEZ rules.
- Vehicles matched to demand—small for community/DRT, high-capacity for busy routes, and features like luggage space or toilets for airport and coach services.
- Consistent branding for a cohesive network.

Depot location and facilities are also critical. Well-placed depots minimise wasted mileage, while equipped spaces support charging, cleaning, and maintenance, especially as fleets decarbonise. Sharing depots or vehicles among operators may further boost efficiency and resilience.

Bus drivers are the public face of the service. Comprehensive customer service and accessibility training, plus empowering and retaining skilled staff, are key to ensuring positive passenger experiences and maintaining a high standard of delivery across SEStran's bus network.

What is the focus of our Strategy?

Fleets and Depots

SEStran's RTS proposes expanding bike-friendly buses, supporting fleet decarbonisation through alternative fuels and pilot projects, and standardising vehicle quality and accessibility. The SRBS prioritises a regional decarbonisation plan, shared facilities, unified technology, greater fleet sharing, and stronger network identity.

Drivers

The Strategy highlights drivers' key role in service quality and aims to improve recruitment, retention, training, and welfare. Drivers are also seen as ambassadors who help increase bus access for those needing assistance.

SRBS Policies for Fleets, Depots and Bus Drivers

The following policies have been developed for the SRBS:

- Promote the consistent deployment of high-quality, well-maintained, and appropriate vehicles across all scales of bus operations in the region, including fixed-route services and other delivery models such as Demand Responsive Transport (DRT), community transport, and the wider third sector.
- The Strategy supports greater alignment of vehicle accessibility standards with on-street infrastructure standards, to improve accessibility across the regional network.
- Drive the decarbonisation of the bus fleet at all scales of bus operation in the region. This should focus on planning, coordination, and cooperation between bus operators, government authorities, and key stakeholders to address the funding, energy, skills, and broader resource barriers for upgrading fleets, depots, and the provision of wider supporting infrastructure.
- Support mechanisms for vehicle sharing to improve fleet utilisation and service viability across sectors such as health and social care, education, and community transport.

Improve passenger satisfaction with bus drivers and address barriers to bus usage by promoting a commitment to high-quality standards at a regional level and facilitating the implementation of measures to achieve these standards.

Data and Monitoring

Why is this important, and what is the situation in the South-East of Scotland?

Collecting and analysing data is key for improving bus networks. Data helps identify problems, guides service improvements to meet user needs, and tracks progress towards targets. While mainly used by planners and operators, this process ultimately impacts customer satisfaction.

What are the main types of data and monitoring practices used in creating a high-quality network?

- **Service and Operational Data:** Includes timetable, route, real-time location (e.g. Traveline Scotland), and disruption/event data. Used for journey planning, service optimisation, performance monitoring, and managing impacts of incidents or events.
- **Patronage, Ticketing, and Demand Data:** Covers ticketing records, patronage levels, demographic/socio-economic data, and travel demand insights from apps. Helps in understanding usage patterns, forecasting demand, and planning services and fares.

- **Customer Feedback and Engagement:** Draws on satisfaction surveys, user engagement, and feedback collected through apps and other channels. Identifies priorities for service improvement and supports targeted interventions.
- **Operational Records:** Includes fuel consumption, vehicle maintenance, and driver performance data. This information supports fleet management, identifies driver training requirements, and enables more cost-effective operations.
- **Emerging and Advanced Analytics:** Utilises artificial intelligence for advanced planning, real-time information, predictive maintenance, safety monitoring, and service personalisation.

As part of Transport Scotland's *Smart, Digital, Integrated Ticketing and Payments Delivery Strategy 2024* improvements are proposed for data, in particular in relation to Digital Travel Data Services to improve data standardisation. This also includes a consultation on bus open data legislation and introduction of regulations under Section 40 of the 2019 Act to require bus operators to provide open data on timetables, real-time information, and fares. Additionally, work will commence to push for enhanced data to be provided by operators for National Concessionary Travel Schemes, including boarding and alighting location data.

What is the focus of our Strategy?

The SEStran RBS will work with stakeholders to enhance the bus network by gathering and sharing data, setting clear standards, and monitoring performance. The strategy encourages publishing key metrics like reliability, punctuality, and fares to boost accountability and public trust, motivating operators and authorities to improve service quality for passengers.

SRBS Policy to Improve Data and Monitoring

The following policy has been developed for the SRBS:

- The strategy supports improvements to transport data collection, analysis, sharing, monitoring, and transparency on performance. This will strengthen the use of data and monitoring by key stakeholders and partnerships to improve the performance and quality of the bus network in the region.

The Role of Governance in Delivery

With the Strategy's vision and objectives in place, the next step is to consider the governance structures needed for successful delivery. Translating ambitions into action requires not just investment and engagement, but governance arrangements that shape service funding, management, and coordination at all levels.

A Changing Landscape for Governance

The delivery of bus services in Scotland is undergoing significant change, driven by ongoing challenges and opportunities at national, regional, and local levels. The Transport (Scotland) Act 2019 has given local transport authorities expanded powers, creating opportunities for innovation and improvement, but also raising questions about how best to implement these powers. Across

the UK, transport authorities are exploring new governance models to address evolving policy, operational, and funding contexts, all under a trend toward greater public control.

To realise this Bus Strategy's vision, objectives, policies and actions, it is essential to consider these governance opportunities as well as the potential for reviewing the national, regional, and local division of roles, responsibilities, and pathways for future joint working.

Collaborative Working in SEStran

With seven of our local authorities, plus Dumfries and Galloway Council, SEStran developed a governance structure for effective collaboration on EV charging infrastructure. Starting with knowledge sharing, the work expanded to joint CPO procurement, now led by City of Edinburgh Council. This approach has reduced workloads, achieved economies of scale, and improved charger distribution.

SEStran also plays a key role in developing RTPI systems. Their support has enabled more efficient operations and a shared learning environment, while allowing local authorities to adapt software to local needs. SEStran continues to engage in ongoing discussions to improve the software.

The People and Place Programme, delivered regionally by RTPs, supports active travel behaviour change and local initiatives. This regional approach has received consistently positive feedback for enabling local interventions while advancing wider objectives, with shared learning embedded throughout the programme.

The Transport (Scotland) Act 2019 gives authorities major new powers for bus service delivery. Local authorities can now:

- Run their own bus services, directly or through arms-length bodies.
- Create Bus Service Improvement Partnerships (BSIPs) with operators.
- Franchise bus services, gaining control over such elements as fares, routes and timetable specifications.

Previously, local authorities' control over bus provision was mostly limited to subsidising uneconomic routes. The Act expands their ability to address network gaps and meet user needs, though few have widely adopted these powers. Some, like Scottish Borders and Highland Councils, now run services in-house.

Identified Governance Challenges

Transport Governance: A report by a short-life working group looking at the roles and responsibilities of the bodies who run Scotland's transport network (Transport Scotland, July 2019), provided a comprehensive assessment of how Scotland's transport responsibilities are allocated at national, regional, and local level (and how this varies across the country), and the barriers this creates for effective delivery.

The report set out a range of challenges, including:

- **Financial and Resource Limitations:** Financial constraints limiting investment at regional/local level; limited resource capability and skills.
- **Governance and Accountability Issues:** Out-of-date governance arrangements; inconsistent and/or unclear accountabilities; limited local accountability, leadership, and influence; lack of clarity on roles and responsibilities, particularly for the public.
- **Service and Modal Support Gaps:** Lack of support for all transport modes; difficulties working across boundaries and responsiveness to local needs; lack of ongoing maintenance of assets.
- **Strategic Disconnects:** Disconnect between long-term goals and short-term action; disconnect with planning, economic, and health agendas.
- **Private Sector and Business Engagement:** Not responsive to local business and private sector opportunities.

The report found that these issues have contributed to a persistent mismatch between aspiration and delivery, especially given Scotland's growing emphasis on environmental, social, and economic imperatives. To address these challenges, the working group suggested a number of potential improvements to transport delivery, including the need to further strengthen regional transport partnerships as key deliverers of change, which was the group's preferred option.

The Potential Value of Governance Changes for SEStran's Regional Bus Strategy

Changes to governance could help address some of these longstanding challenges. Adopting a regional governance model would allow authorities to pool resources and expertise, achieve economies of scale, and more effectively deliver cross-boundary routes with shared, complex costs. Improved regional coordination could help stabilise or expand services in areas where the commercial market alone cannot meet demand. It would also enable targeted investment to address major service gaps, such as those in rural areas or during evenings, and allow for faster, more coordinated responses to disruptions or the development of new partnerships.

SEStran's Position on Transport Governance

Given ongoing challenges and the opportunities identified by the Transport (Scotland) Act 2019 and the Transport Governance Working Group, SEStran has reviewed its approach to governance reform. The persistent problems highlighted in this Bus Strategy's Case for Change—and feedback from local authorities, operators, and the public—are clear.

SEStran endorses the Working Group's view: a regional governance model warrants serious consideration. While the 2019 Act creates important new powers, existing structures don't always allow these to be used effectively where they'd help most.

Crucially, SEStran's position on governance reform and the application of Act's powers is based upon the **principle of proportionality**: enhanced regional or local powers should only be invoked to the degree necessary to overcome significant barriers to achieving the vision for the Regional Bus Strategy (and Regional Transport Strategy, as appropriate). Collaborative partnership working and engagement remain the default approach, with statutory intervention only considered if market-based or voluntary solutions have proven inadequate.

SEStran's distinctive context – including the presence of a major municipal operator that is partly owned by multiple local authorities, a diverse mix of commercial operators and some supported services – makes a proportional, partnership-led model that builds on these existing foundations particularly well-suited to the region.

Delivering the SEStran Regional Bus Strategy

SEStran will focus on cooperation with local authorities, operators, and stakeholders, putting user needs first.

Supporting Local Authorities
SEStran does not intend to override local efforts but will concentrate on regional challenges where cooperation adds value. Many authorities face rising costs and lack the resources to use the Transport (Scotland) Act 2019 powers directly, given current resource constraints.

Voluntary Partnership and Evaluating its Success
SEStran will strengthen collaboration through voluntary regional efforts, such as:

- Coordinating or delivering regional services with councils seeking partnership,
- Developing joint procurement, marketing, or ticketing for seamless travel.

The strategy will remain adaptive, evolving with feedback, experience, and as new opportunities or barriers appear. If voluntary measures are insufficient, SEStran—directed by its board and councils—will consider more radical reforms, fully investigating concerns such as potential impacts on jobs or local funding. Any new regional roles would aim to support and enhance local capacity, not replace it.

SEStran would look to review the efficacy of the voluntary model every three years, in collaboration with partners, like; Transport Scotland, local authorities, operators, and our Board.

The Route to Implementation
For each core strategy area - such as network coverage, service quality, user experience, and integration—SEStran will develop a "now to future" scenario, mapping a clear trajectory from the current position toward the desired future state. Initial actions will prioritise partnership working, focusing on collaboration with local authorities, operators, and stakeholders. If significant gaps persist despite these efforts, SEStran will be prepared to consider implementing enhanced powers or adopt new governance models as appropriate to address persistent challenges.

The decision-making process will be fully transparent and will involve ongoing engagement with all relevant partners, ensuring that any changes are evidence-based and supported by those affected.

In conclusion, SEStran's approach to delivering the Regional Bus Strategy is reinforced by both the legislative opportunities provided by the Transport (Scotland) Act 2019 and the insights gained from the Transport Governance Roles and Responsibilities Working Group. The proposed path is both staged and participative: it begins with a commitment to renewed partnership but remains ready to adapt governance arrangements and pragmatically use new legislative powers as required, all with the goal of achieving improved bus outcomes for communities across the region.

GO SEStran

South East of Scotland Transport Partnership

SEStran Regional Bus Strategy – Case for Change

Thursday, 22nd of August 2024

SUMMARY

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.[1] The analysis as set out in this 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.[2] 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 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
- Most 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 public 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, faster and more reliable services, cheaper and simpler fares, an improved passenger experience and a network which is resilient to change and offers a greater sense of permanence to residents and businesses.

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

To provide a high quality, affordable, accessible and available 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.

[1] SEStran-2035-Regional-Transport-Strategy.pdf
[2] Scottish Transport Statistics 2023 | Transport Scotland (STS Chapter 02, Table 2.2b)

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 will consider 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.

(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

INTRODUCTION

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.

There are essentially six aspects to this, which the report covers:

- Part 1 sets out the **regional and policy context**, and why a sustainable and growing bus network is key to meeting many of these policy objectives
- Part 2 sets out the key **policy problem**, how, on the demand side, long and short-term trends show that in most parts of the region, bus travel is at best flatlining or declining, and passenger satisfaction levels are low and falling
- Part 3 identifies a range of **supply side problems** with the region's bus services, and seeks causal explanations which may be driving the decline in passenger numbers
- Part 4 sets out how **services are currently delivered** across the region, competition from other modes and the findings of engagement undertaken with bus industry stakeholders
- Part 5 summarises the above **problems** and also considers **opportunities** and **constraints** affecting bus services across the region
- Part 6 then sets out a **vision, objectives and desired outcomes** for the Strategy

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 sections which follow set out the conclusions of the RTS and undertake a detailed analysis of the bus network in the SEStran region, considering both supply and demand, and reflecting on how the existing bus network is shaped by the current 'model' under which services are delivered.

The Case for Change concludes by setting out 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.

PART 1: REGIONAL AND POLICY CONTEXT

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.[3] 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 SRBS sit - the most pertinent elements of context for this study are:

- Most importantly 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 population growth is allied to reductions in average household size (persons / household) creating an 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

Regional Transport Strategy

The 2035 SEStran RTS[4] was published in 2023 and sets out the following **Vision** for transport in the region:

A South-East of Scotland fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets.

The RTS reinforces national policy ambitions, reflecting Scotland's National Transport Strategy 2 (NTS2),[5] published in 2020 and the revised climate change targets published by the Scottish Government in the updated *Climate Change Plan (CPPu)*.[6] The latter of these documents sets out a number of key national targets of particular relevance to this strategy, including to:

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

The Scottish Government's route map to achieving these targets is set out in the Reducing Car Use for a Healthier, Fairer and Greener Scotland (2022) publication which outlines investing in the public transport network as a key part of the path to achieving the 20% reduction in car kilometres sought by 2030.[7]

At its core, the RTS signals the need for transformational change in transport and travel behaviour. The strategy recognises the transport challenges around active travel, public transport, mixed modes, freight, and car use. The challenges addressed are focussed on those from a user perspective, which cover issues such as travel costs, the lack of public transport connectivity and services, confusing travel information, safety, accessibility, and reliability, as it is these things which will drive the desired behavioural change.

Four Strategy Objectives were set (as shown in Figure 1) covering the transport system in terms of sustainability, healthier travel options, connectivity, and safety and efficiency.

[3] SEStran-2035-Regional-Transport-Strategy.pdf
[4] SEStran-2035-Regional-Transport-Strategy.pdf
[5] National Transport Strategy 2 | Transport Scotland
[6] Securing a green recovery on a path to net zero: climate change plan 2018–2032 - update - gov.scot (www.gov.scot)
[7] A route map to achieve a 20 per cent reduction in car kilometres by 2030 | Transport Scotland

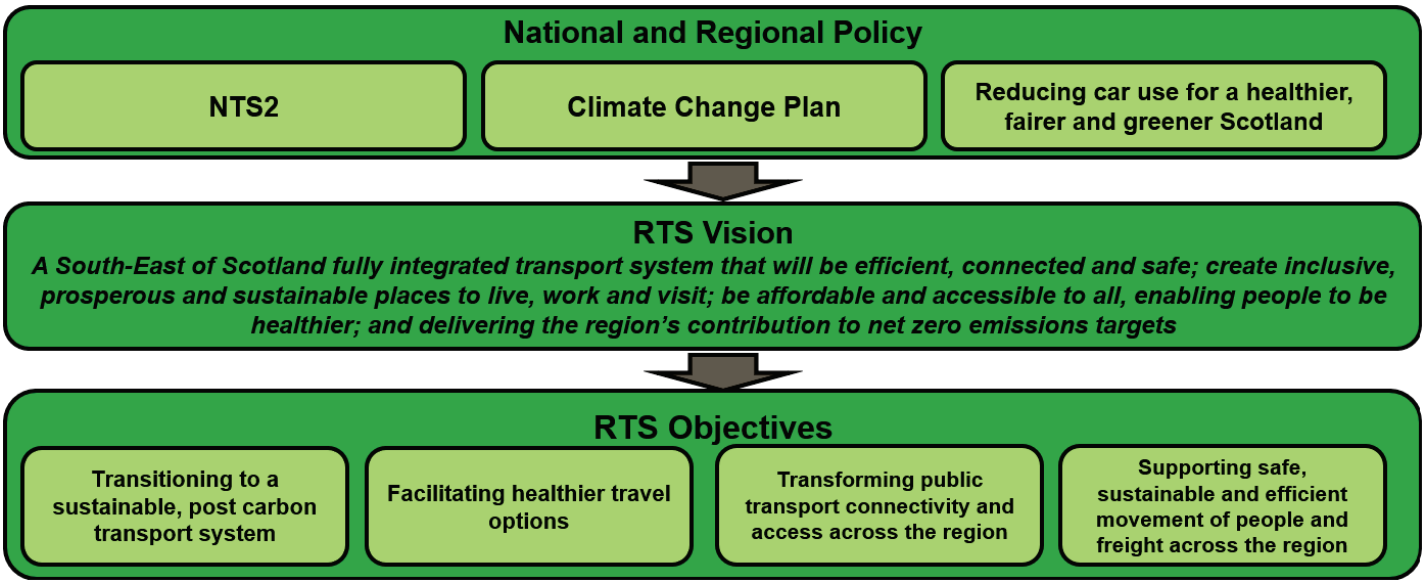


Figure 1: RTS Vision and Objectives

The RTS sets out a range of policies and actions that will shape investment in transport for the next 10 to 15 years, reflecting these national and regional objectives. These are set out in thematic chapters, of which the most relevant here are:

- **Enhancing access to and the accessibility of public transport** – covering topics such as physical accessibility, information and affordability
- **Transforming and extending the bus service** – in the shape of bus priority, network coverage, service frequency and the new powers available through the Transport (Scotland) Act 2019
- **Delivering seamless multi-modal journeys** – including integrated ticketing systems
- **Decarbonising transport** – including the bus fleet
- **Reducing car kilometres** – targeting 'avoidable' car kilometres by providing alternative modes such as the bus

This will all need investment in public transport, so public transport becomes an attractive choice and achieve a key theme within the strategy - Reducing Car Kilometres. This theme recognises that travel by private car is the dominant method of transport across the SEStran area (aside from travel into central Edinburgh) and public transport in the region is predominantly Edinburgh focussed with public transport options between local authorities more limited.

The RTS also emphasised the issues deterring people from switching to public transport including long bus journey times relative to the equivalent car journey time, congestion, road space allocation and service reliability.

Another other key aspect of the RTS is to better connect communities affected by deprivation to a wider range of communities. The RTS identifies locations where poor public transport connectivity may be contributing to deprivation and emphasises that any improvement in these areas should focus on improving connectivity to employment, training, educational opportunities and to key services.

The RTS also recognises that transport plays an essential role in linking land uses and enabling people to get to their destinations, and it is key that the transport system caters for this demand in an effective and sustainable way in a manner that embeds Transport Scotland's Sustainable Travel Hierarchy (which places public transport above taxi and shared transport and the private car). This contributes to economic and environmental benefits and that a good public transport system is critical to achieving a more inclusive economy and reducing health inequalities by ensuring fairer access for people who do not have a car.

Key Insight: The RTS concludes that the strategy will not be achieved without improving the coverage, quality and integration of the bus network and sets out a policy aiming for a sustainable, prosperous and inclusive passenger focused public transport system.

The RTS recognises that the vision for public transport in the region forms part of a wider local, regional and national policy context (as highlighted in Figure 2). The RTS supports these wider aims and objectives for the region, often

acting as a core catalyst to their delivery. In this regard, bus has an important role in the successful delivery of both transport policy and wider social, environmental and economic policy aims.

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

National Policy

The key national policy documents noted in Figure 2, as well as the Scottish Government's *Programme for Government (2023-24),* [8] represent some of the national policy framework the bus strategy seeks to support, and within which bus has a major and multi-faceted role in ensuring their successful delivery.

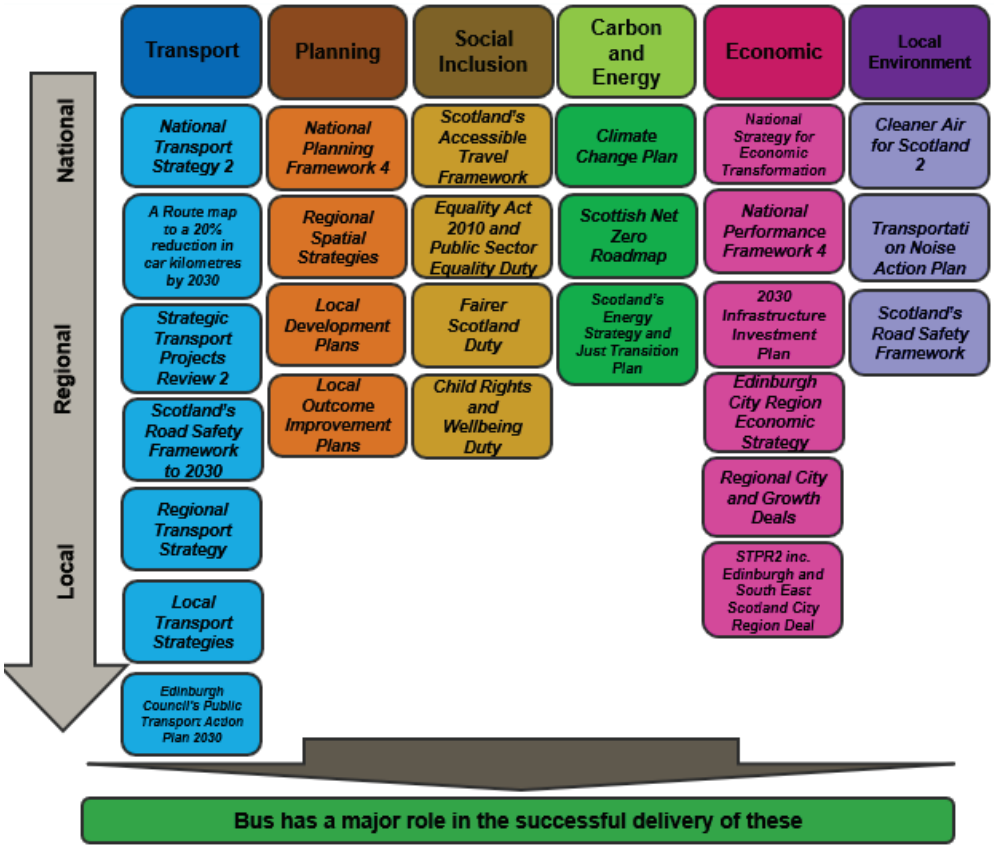


Figure 2: National, Regional, and Local policy

Carbon Emissions

The bus sector plays a significant role in helping to reduce the level of carbon emissions released in the region by reducing the level of private car use. However, transitioning buses to zero-emission technologies this will reduce emissions released even further and contribute to decarbonisation goals.

Significant progress in decarbonising Scotland's bus fleet is already underway. The Scottish Zero Emission Bus challenge fund (ScotZEB) opened to applications in 2021 with the aim to support swift and significant change in the bus market in favour of zero-emission technologies.[9] By supporting the swift transition to zero emission vehicles and infrastructure, the fund is helping to achieve targets to reduce greenhouse gas emissions, contribute to the delivery of Low Emission Zones, and encourage inward investment and growth in the supply chain of zero carbon vehicles. Phase 1 of the funds saw over £62 million awarded to decarbonise buses, which is the largest investment made in Scotland towards bus decarbonisation. Of this funding, there was a significant award of £5.5m made to the operator Ember Core that operates in the SEStran area for the delivery of 26 new electric vehicles. Phase 2 of the ScotZEB funding sees a further £58million awarded and available for drawdown during 2023/24 through to 2025/26. The fund closed for Phase 2 applications in September 2023, with funding as yet unawarded at the time of writing.

[8] Programme for Government - gov.scot (www.gov.scot)
[9] Scottish Zero Emission Bus challenge fund | Transport Scotland

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

NPF4 notes *the priority for the Scottish Central region that the delivery of* ***sustainable places,*** *Regional Spatial Strategies and Local Development Plans in this area should support net zero energy solutions including…improved low carbon transport*. [10]

The Scottish Government's Programme for Government (PfG) (2023-24), published in September 2023 states the bold and ambitious actions on net zero in the transport sector, including supporting operators *to change the market for zero emission bus travel through our Scottish Zero Emission Bus Challenge Fund*. The PfG delivery plan for the year ahead included *laying secondary legislation to enable bus franchising and partnership options to be developed, providing even more powers to Councils.* This is currently being delayed due to the pre-General Election period and will be revisited following the election on the 4th July 2024.

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

Access to Health and Social care

A Transport to Health Delivery plan has been prepared to deliver actions to take forward recommendations from the 2019 report: Transport to Health and Social Care – which was prepared by the Mobility and Access Committee for Scotland (MACS) at the request of Ministers. [11] This report made 27 recommendations that the Scottish Government should take forward regarding transport to health and social care services.

The draft delivery plan identified 16 commitments which can be taken forward, based on their feasibility, deliverability and affordability. These align with current policy commitments / delivery plans and promote and facilitate a focus on access to healthcare in a fair and equitable way, including through better integration of healthcare considerations into transport planning.

This RBS will contribute to the delivery of some of these commitments as local authorities are expected to have an accessible transport strategy and targets, which encourage and facilitate more disabled people and older people being able to use public transport to attend medical appointments. There is a need to ensure community and public transport provision meets demand and is accessible, available and affordable to all. This aligns with the four priorities of Scotland's National Transport Strategy and the recommendations of Transport Scotland's Accessible Transport Framework.

Advancing equality and tackling inequalities

The SEStran region covers 8,400km^2, which is over 10% of Scotland's landmass. It is demographically and spatially diverse with areas that fall into every one of the Scottish Government's urban-rural classification. SEStran has a population of over 1.6 million which is concentrated mainly within the City of Edinburgh accounting for around 33%, as well as medium to large settlements in the eastern central belt. However, there are **large and sparsely populated rural hinterlands** outside of these main urban areas.

The SEStran region is **demographically and spatially diverse** with a large number of disadvantaged and access-deprived communities. The region has many challenges associated with education, health, and economic activity. Transport has a significant role in tackling these problems as it helps people to access educational opportunities, health services, and jobs so they can participate fully within society.

A range of impact assessments are being carried out for the SRBS, including the public sector equalities duties of **Fairer Scotland Duty**, **Equalities Impact Assessment** and **Child Rights and Wellbeing Duty**. The scoping stage

[10] national-planning-framework-4.pdf (www.gov.scot)
[11] subgroup-transport-to-health-report.pdf

for these impact assessments has identified key evidence for the Case for Change, some of which is discussed below.

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

Access to the public transport network can also be challenge for some. Analysis of Scottish Household Survey data identified that 23% of the population of the region have a limiting long-term physical or mental health condition whilst 19% are over the age of 65 with significant growth in elderly population anticipated in the future. These groups along with others like those with disabilities, the mobility impaired and parents with pushchairs can experience physical barriers to accessing public transport networks and services which was highlighted as a particular concern by stakeholders at the active travel workshop, citing the need for step free access at stations. Fife Council outlined that some stations in their area are not compliant with the Equality Act 2010, which prohibits discrimination, harassment and victimisation of people who possess a protected characteristic.

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

It is recognised that transport has a significant role with influencing education levels as a disparity in access to education can have a causal effect on this. There is a large disparity in **education levels** across the region, with Edinburgh having the highest proportion of degree level qualifications of 45% in comparison to Clackmannanshire where 21% have degrees. Edinburgh also has the lowest proportion with no or unknown qualifications of 9%, compared to Fife who have the highest proportion with no or unknown qualifications of 19%. Furthermore, those living in Edinburgh can access their nearest tertiary education centre in 30 minutes or less of their residency, in East Lothian this only applies to 30% of their residents.[12]

Transport will also have a direct effect on the **economic growth** of the region, enabling people to have greater job opportunities, especially for those in rural areas where there is a dispersed distribution of jobs and for those who are dependent on public transport and active travel. It is recognised in South East Scotland that the areas where employment is concentrated are also areas which have the best access to public transport, showing the direct correlation between the two. Therefore, the more rural areas of the Scottish Borders, parts of East Lothian, Fife, and Clackmannanshire have the lowest level of access to employment.

There are also **significant inequalities** between areas in the SEStran region. From the 2020 Scottish Index of Multiple Deprivation each of the region's eight local authorities have at least one data zone in the bottom 10% most deprived nationally, but also at least one in the least deprived 10%. The most deprived areas in the SEStran region are parts of Edinburgh and Fife (particularly Levenmouth), West Lothian, Falkirk and Clackmannanshire. Transport has a key role to play in tackling deprivation as it helps people get to work, education and training opportunities, to access healthcare and other services and to participate more fully in society. In particular, many jobseekers rely on public transport (particularly the bus) to reach these opportunities.

Transport can contribute to greater **gender inequalities** as in Scotland as 75% of the part time workforce is female, and they are therefore more likely to make more journeys and stop more frequently as they are also more likely to take on child care responsibilities. Distances to workplaces and education services can also be significant, which has time and cost implications. Bus services often only have a limited service which may not be available at the times when work is available for some people.[13] Women often have unique travel behaviours and needs, which must be addressed by tailored solutions. For example, women are more likely to make multi-stop and multi-purpose trips.[14] These challenges highlight the need for strategic planning to address the unique needs and concerns of part-time

[12] SEStran-Main-Issues-Report.pdf
[13] Rural Employment - Policy | Employability in Scotland
[14] Key issues and evidence | Transport Scotland

workers and female bus users in Scotland. It's important to ensure that bus services in the region are inclusive, safe, and accessible for all.

Furthermore, the transport system has a huge impact on the Scottish population who live with **a long-term limiting illness**, which makes up almost a third of the Scottish population, and for those who are disabled. Between 2008 and 2017, the proportion of women who lived with long-term limiting mental or physical health conditions or disabilities increased from 28% to 34% and for men it increased by 23% to 29%. People living with these challenges are more likely to be unemployed and to live in poverty, and access to adequate transport was identified as the biggest barrier to work among impaired UK adults. Some 60% of young people (12 to 26 years) who have a disability or access requirement do not feel comfortable using public transport. [15]

Up to a third of bus passengers do not feel safe when travelling by public transport in the evening. These problems are particularly acute for the most vulnerable groups including the young, elderly, disabled, women and ethnic minorities. In addition, some users also have difficulty accessing public transport information. This is also likely to be a problem for infrequent or non-public transport users who are less familiar with where and how to access public transport information.

Strategic Transport Projects Review 2 (STPR2)[16]

Within Transport Scotland's STPR2, published in 2022, the recommended projects to help deliver the vision, priorities and outcomes for transport as set out in NTS2 are stated, taking account of alignment with other national plans, such as the Infrastructure Investment Plan, NPF4 and Climate Change Plan. STPR2 sets out a range of recommendations, a number which will be of relevance to the SRBS including:

- Recommendation 14: Provision of strategic bus priority measures
- Recommendation 20: Investment in Demand Responsive Transport and Mobility as a Service
- Recommendation 21: Improved public transport passenger interchange facilities
- Recommendation 23: Smart, integrated public transport ticketing
- Recommendation 26: Decarbonisation of the bus network

Most pertinently though, Recommendation 12 is **Edinburgh and South East Scotland Mass Transit**. [17] This scheme aims to provide greater public transport options, improve region wide connectivity, and encourage a modal switch from the private car to sustainable modes. Therefore, this would provide a significant contribution to help achieve the STPR2 objectives of: Taking climate action, Addressing inequalities and accessibility, Improving health and wellbeing, Supporting sustainable economic growth and Increasing safety and resilience.

Edinburgh Mass Transit is also noted within **NPF4** as an opportunity to '*support placemaking and deliver improved transport equity across the most densely populated parts of Scotland, improving access to employment and supporting sustainable investment in the longer term'.* The Edinburgh and South East Scotland Mass Transit project would integrate the current bus, tram and heavy rail networks in the region and would provide improved connectivity between these modes. It would also include smart ticketing and passenger information services which would improve the user experience by making it simple to use.

At this stage no detail of these proposals has been drawn up. The development of the SRBS therefore provides an opportunity to feed into and influence the development process for these proposals.

Key Insight: Bus has a key role to play in meeting many national and regional policy objectives, especially in terms of addressing inequalities across the region, tackling the climate crisis by promoting modal shift from car and making our towns and city less car dominated. To meet these objectives, there is a need for a **growing, thriving and sustainable bus sector** in the region which provides more travel opportunities and a more attractive alternative to the car.

[15] https://syp.org.uk/campaign/all-aboard/
[16] https://www.transport.gov.scot/media/52681/final-summary-report-28-december-2022-stpr2.pdf
[17] stpr2-phase-1-ast-project-9b-edin-mass-transit-3-feb-2021.pdf (transport.gov.scot)

PART 2A: DEMAND SIDE - THE BUS NETWORK IN THE SESTRAN REGION

Buses are the backbone of the public transport network across the SEStran region, especially given the absence of a well-developed urban rail network in Edinburgh. However, the bus network in the region has been on a very different trajectory compared to other public transport modes in recent years. This section sets out the key trends over the last 20 years or so, in terms of passenger journeys and bus kilometres at the regional and local authority level, and how this compares to other transport modes. The sections which follow cover:

- Passenger journeys: SEStran level, local authority level and Scotland level (long term)
- Bus use by trip purpose
- Travel to work in the SEStran region
- Bus vehicle kilometres
- Long term trend comparison with other modes

Passenger Journeys – SEStran Level

As shown in Figure 3 and Figure 4, in the years prior to the COVID-19 pandemic from 2005-06 to 2019-20, total bus passenger journeys in South East Scotland (equating the SEStran region) rose to a peak in 2006 and 2007 when 174 million journeys were made before falling by 20 million (11%). During this period, population in the region grew by 11%.[18]

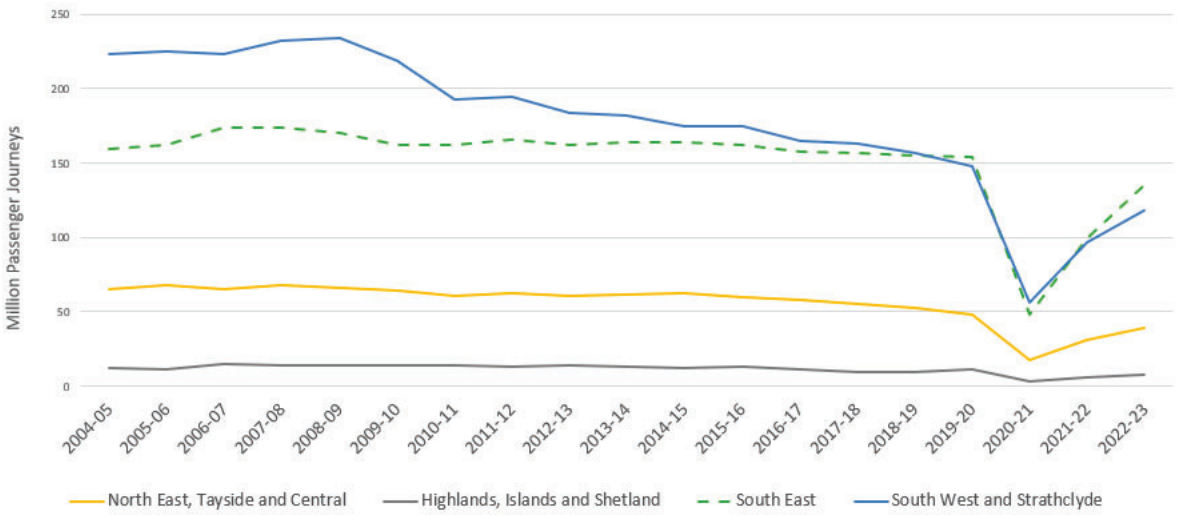
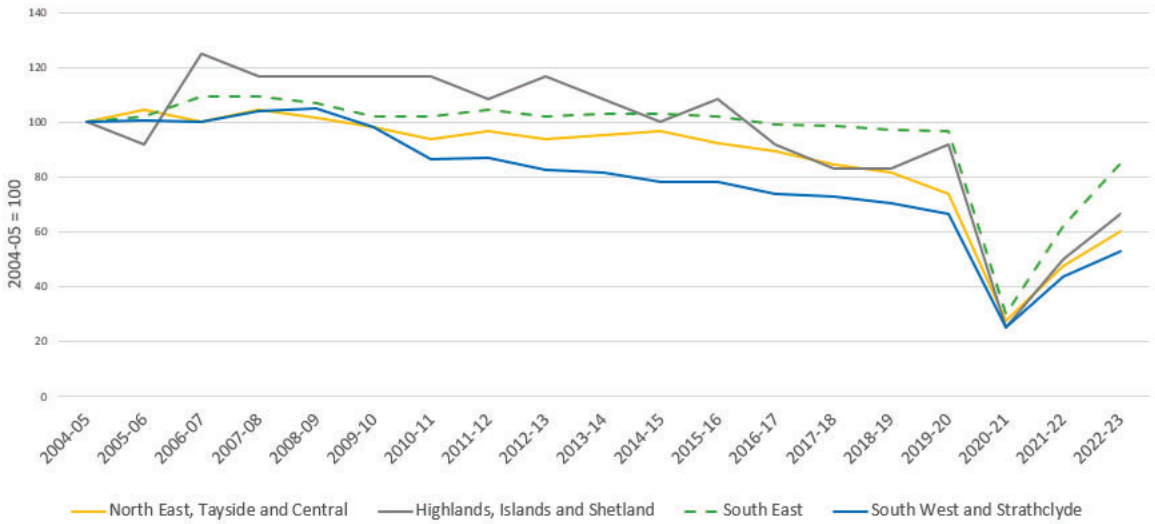


Figure 3: Annual Passenger Journeys (2004/05 - 2022/23) – Absolute Figures (Scottish Transport Statistics)



[18] National Records of Scotland

Figure 4: Annual Passenger journeys (2004/05 – 2022/23) - Indexed to 2004/05 = 100 (Scottish Transport Statistics)

When indexed it is clear that whilst each region in Scotland saw a fall in bus passengers, the drop in South East Scotland was less severe than in other parts of Scotland.

The most recent data from 2022-23 shows that bus passenger figures had recovered to 88% of the 2019-20 figure in South East Scotland, which again is a healthier picture than the rest of the country. This recovery will have been aided by the introduction of free travel for under 22s in 2022. Nevertheless, this decline in passenger numbers is clearly the reverse of what is required to meet the broader policy objectives.

Passenger Journeys – Local Authority Level

Whilst local authority level bus passenger figures are not available, the Scottish Household Survey (SHS) provides a good indication of the relative use of bus across the region in an absolute sense and over time.

In 2022, local bus services in the SEStran region were used 'every day', or 'almost every day' by 8% of the population, with 12% using them '2 or 3 times per week', 10% 'once a week', and 17% 'once a fortnight or once a month'. This means that approaching half (47%) of people in the SEStran region use local bus services in a typical month, which is the highest level across the Scottish transport partnerships.[19] On the other hand, over half (53%) do not typically use bus services.

Figure 5 below shows the proportion of residents in each local authority area who used the bus at least twice a week (defined here as regular users) in 2012/13, 2019 (pre-COVID-19) and in 2022, the most recent data.

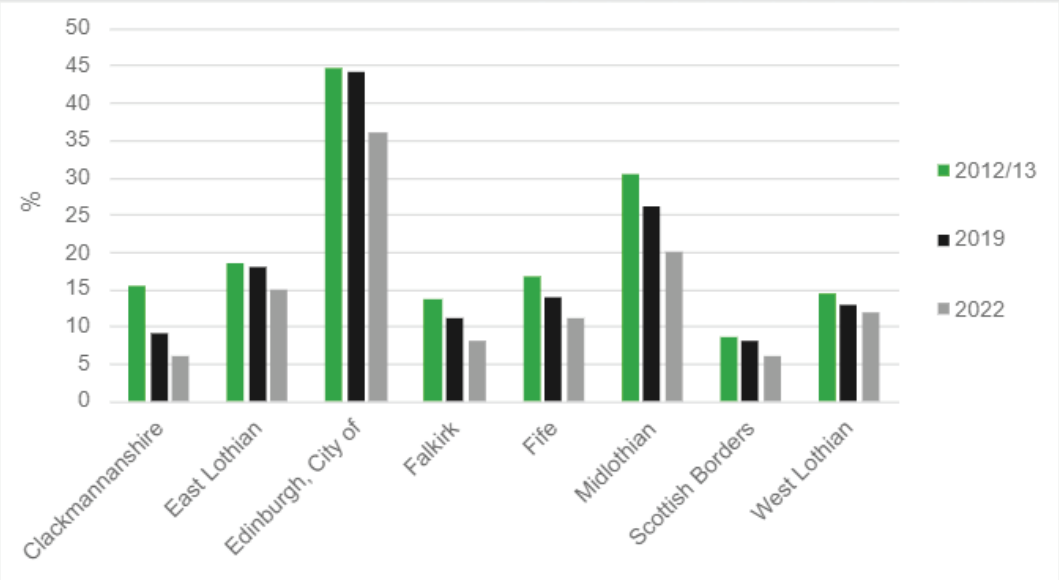


Figure 5: Proportion of adults using the bus at least twice a week (Scottish Household Survey)

This shows how the proportion of people who are regular bus users (2+ times per week) is by an order of magnitude greater in Edinburgh than anywhere else in the region and by 2022, Clackmannanshire and Scottish Borders had the lowest proportion of frequent bus users. When local authority populations are taken into account, these figures suggest that City of Edinburgh residents account for around 2/3 of all bus trips made in the region, despite only comprising around 1/3 of the population. Of course, as a densely populated city with a well-developed bus network, these results would be expected. However, it is worth noting that the 2022 figure for Edinburgh (36%) is far higher than Scotland's other main cities – Glasgow (26%), Aberdeen (16%) and Dundee (24%), and therefore Edinburgh is out-performing these other cities against this metric.

Whilst the proportions of regular users were falling in all the local authorities between 2012/13 to 2019, the declines were particularly sharp in Clackmannanshire (a 42% drop), Falkirk (19%), Fife (16%) and Midlothian (15%). The declines in Edinburgh and East Lothian were much more modest (at 2%). **The trends around bus use in the region are therefore on very different trajectories**.

Figure 6 below shows the same data for those who had not used a bus in the last month at all.

[19] Transport and Travel in Scotland 2022 | Transport Scotland

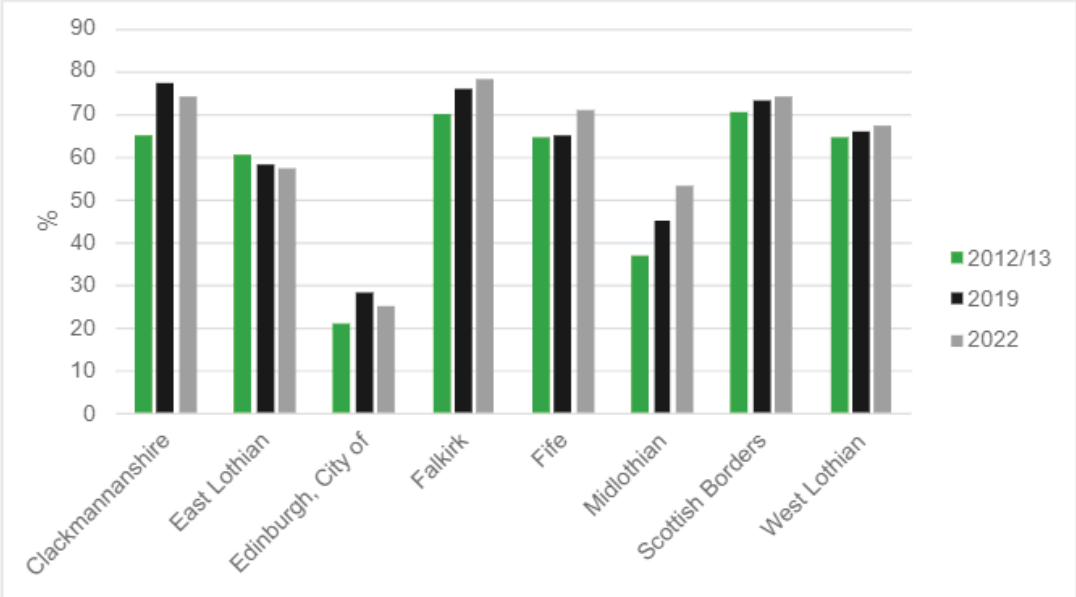


Figure 6: Proportion of adults not using the bus in the last month (Scottish Household Survey)

Reflecting the previous graphic, the proportion of adults not using the bus at all in 2022 was over 60% in Clackmannanshire, Falkirk, Fife, Scottish Borders and West Lothian. In most areas this proportion has increased over time. In Edinburgh only around a quarter of adults are not bus users by this definition, the lowest figure of any local authority in Scotland.

The proportion of adults not using the bus over time is therefore increasing in most local authority areas in the SEStran region.

Passenger Journeys – Scotland, long term

Longer term trends at the Scotland level show a steady decline in bus use since 1975, as shown in Figure 7 below. This suggests that bus deregulation in 1985 did not result in a material change in the overall downward trend since the mid-1970s.

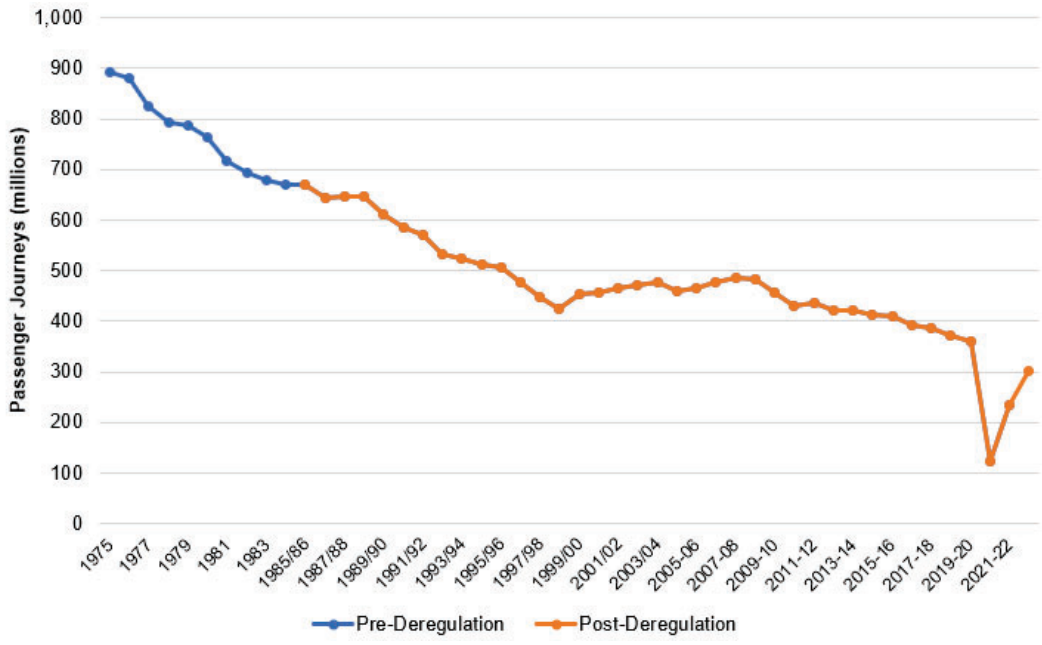


Figure 7: Passenger journeys on local bus services, Scotland (1975 – 2022/23)

The COVID-19 pandemic has had a significant impact on the use of public transport. The permanent trends of increased home working and lingering concern over infection amongst some means that passenger demand has still

not recovered to pre-pandemic levels. As of March 2024, at the GB level, the Department for Transport report that for bus boardings (outside London) weekday bus usage is around 90% of the pre-COVID-19 baseline.[20]

Travel to Work

The 2011 census travel to work data[21] analysis which was undertaken as part of the RTS development work shows the mode of travel workers in the SEStran region used when commuting in different parts of the region. This is shown below in Figure 8.

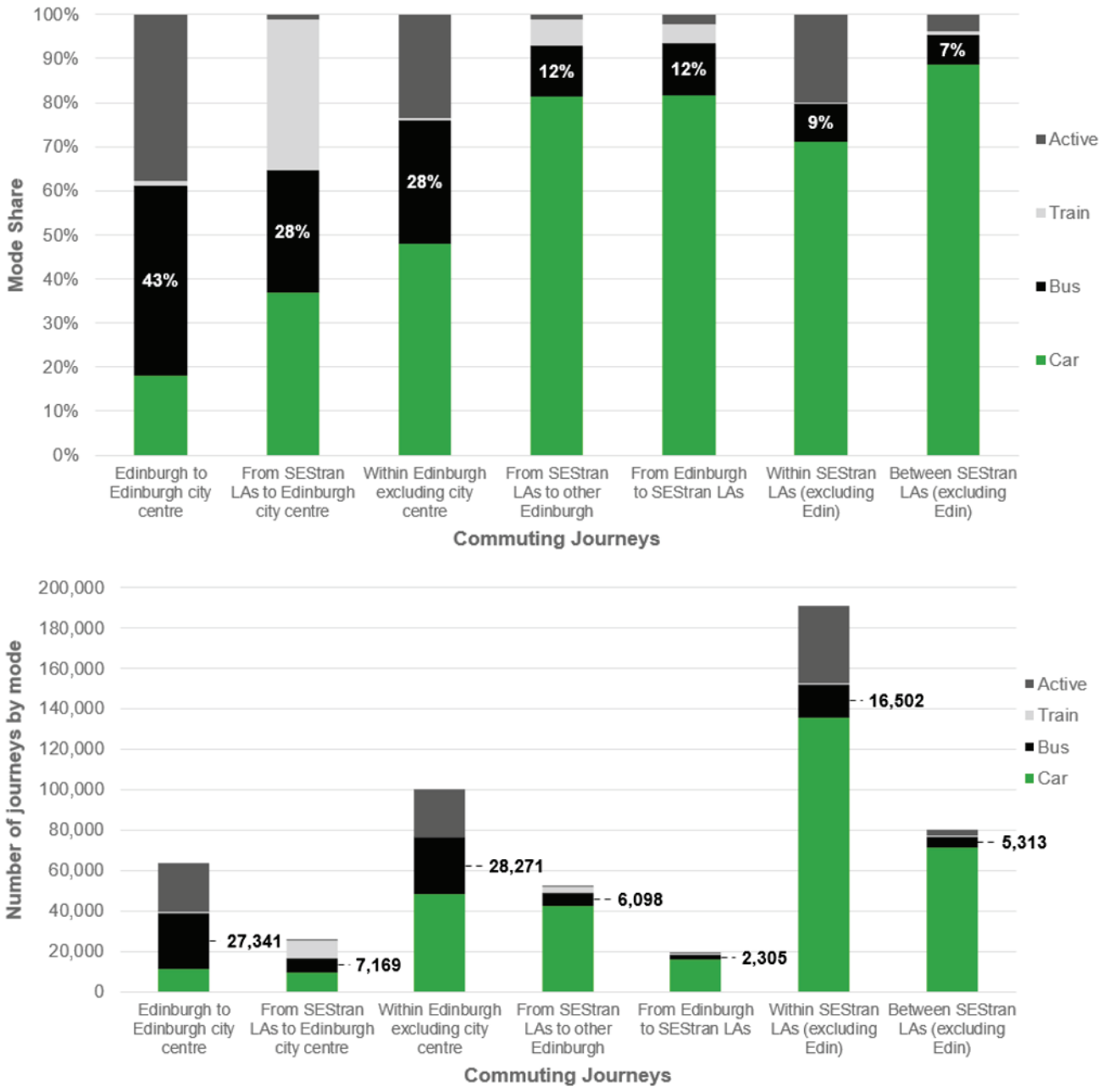


Figure 8: Travel to work by mode of travel (mode share percentage - top, and number of journeys by mode - bottom)

There are large variations in bus mode share across the different types of commuting movement analysed. Travel from within Edinburgh to Edinburgh city centre had the highest proportion of bus use with 43% of journeys undertaken by bus. This is the only movement that was analysed in the region where bus is the most popular mode of travel. In comparison, bus use is significantly lower for journeys outside of Edinburgh to the city centre (28%). The

[21] Data from 2022 Census not yet available

lowest proportion of bus use is seen between SEStran local authorities (excluding Edinburgh) and within SEStran local authorities (excluding Edinburgh) which had a modal share of 7% and 9% respectively. The private car is by far the most used mode of travel for commuting in the SEStran region with six of the seven commuting trip types analysed here having it as the most popular mode.

Although Edinburgh to Edinburgh city centre has the highest proportion of bus journeys, the highest number of bus journeys took place within Edinburgh (excluding the city centre) at 28,271. This varies widely in comparison to the 2,305 bus journeys from Edinburgh to SEStran local authorities and the 5,313 bus journeys between SEStran local authorities.

The number of trips made by private car therefore increases significantly when Edinburgh is excluded, and nearly two-thirds (62%) of car commuting trips made by residents of the region do not involve Edinburgh. Also, a significant proportion of car commuter trips (42%) are regional, or cross local authority boundary.

Key Insight: Travel to Work data shows that bus-based commuting is very limited outside of Edinburgh with a mode share of less than 10%. There are a large number of car trips for travel in and between the other local authorities in the region. If targeting substantial reductions in car kilometres, areas outwith Edinburgh should be a focus.

Bus Vehicle Kilometres

Similar to the steady decline in bus passengers, as shown in Figure 9 and Figure 10, the South East of Scotland witnessed a decline in bus vehicle kilometres, which is measured as the distance covered by local bus services, of 7 million (6%) between a peak in 2008/9 and 2019/20, before COVID-19 restrictions were introduced. This decline is slightly less than that seen for passenger numbers. Since 2004/05, bus passenger numbers in the region have followed a broadly similar trend to bus kilometres, but since the pandemic, bus passenger numbers have fallen more sharply than bus kilometres.

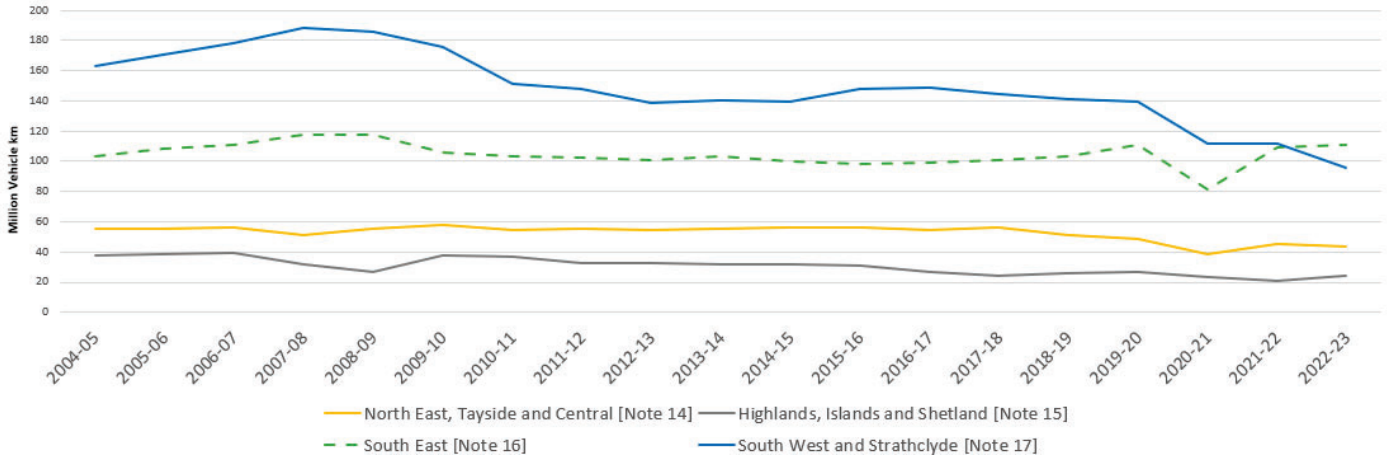


Figure 9: Annual Vehicle Kilometres (2004/5 – 2022/23)

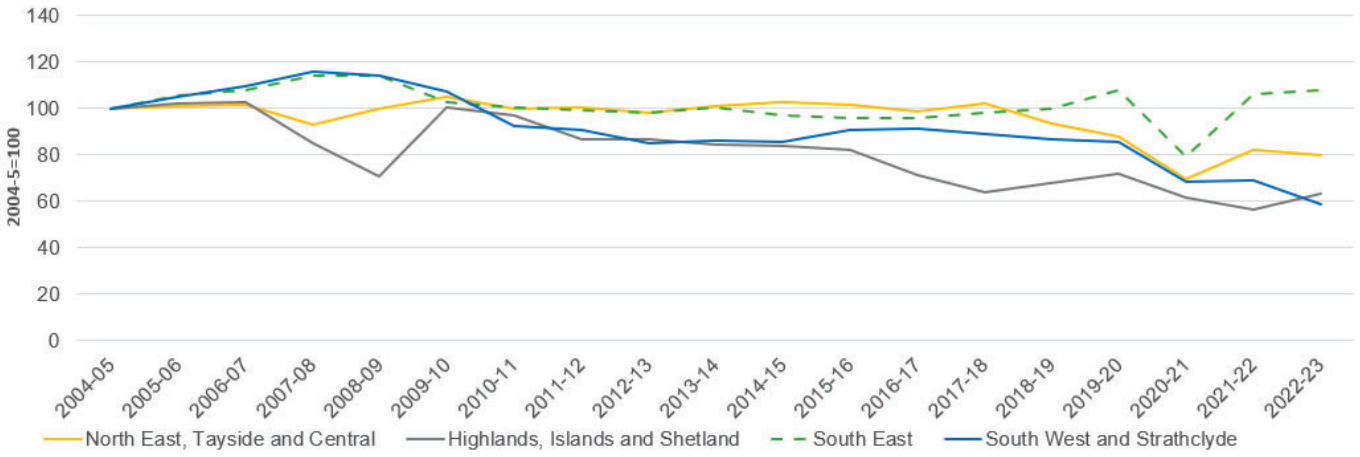


Figure 10: Annual Indexed Vehicle Kilometres (2004/5 – 2022/23)

The South East experienced a fall in bus kilometres of approximately 27% between 2019/20 and 2020/21, which was the largest proportional fall of all Scottish regions but data from 2021-22 shows that bus kilometres in the South East had increased by 34% on the 2020-21 figure, significantly higher than any other region following COVID-19. This growth continued in 2022-23 with vehicle kilometres rising to 111 million in the South East (the same as 2019-20), which is 40% of the total local bus service kilometres in Scotland.

There is a stark contrast between the South West and Strathclyde and the South East in these trends. By 2022-23, bus kilometres in the South East actually exceeded the South West and Strathclyde by 16%, when in the peak year of 2007-08, bus kilometres in the South West and Strathclyde were 61% higher than in the South East. Pre-pandemic in 2019-20, mileage in the west was still 25% higher than in the east.

Key Insight: The South East as a whole saw a steady decline in bus vehicle kilometres of 7 million between 2008/9 and 2019/20, before the COVID-19 pandemic, but this has recovered strongly. There is a stark contrast between the positions around the two biggest city regions in Scotland, Glasgow and Edinburgh - with a major reduction in bus kilometres in the former. The different approaches taken to the delivery of bus services in the two city regions is likely a key factor in this.

Comparison with other modes

A comparison of annual passenger journeys by bus and rail, as well as road traffic vehicle kilometres (indexed against 2004 levels), is shown in Figure 11. Data is from Scottish Transport Statistics and the Office for Road and Rail.

Key Insight: There has been sustained decline in bus passenger numbers compared to car (which grew steadily since the financial crisis in 2008-09) while rail had seen a very large increase before COVID-19. By 2022/23, bus and rail passenger numbers were still substantially below pre pandemic levels, yet road traffic levels had almost fully recovered. This implies a shift away from bus travel to these other modes.

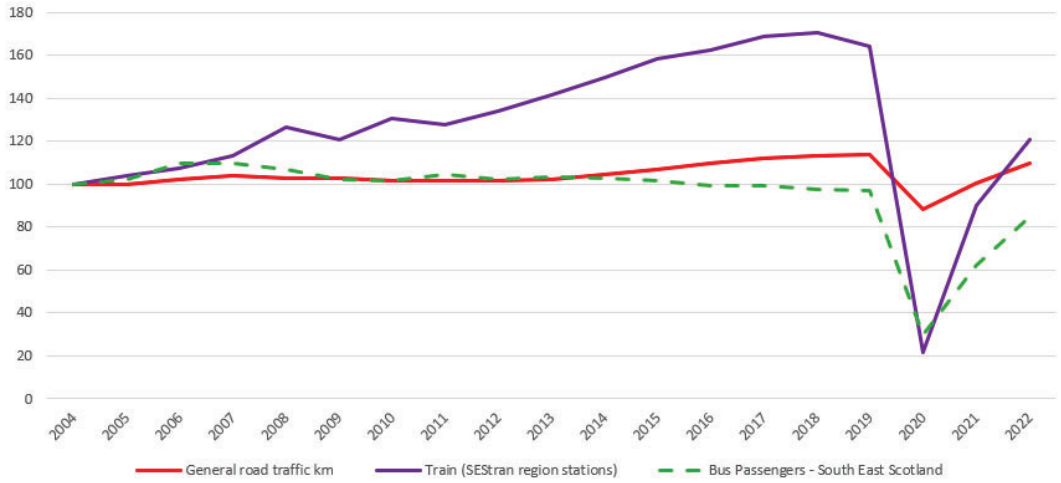


Figure 11: Annual Passenger Journeys - Bus journeys benchmarked against rail journeys and car / van kilometres (SES area) (2004/5 - 2022/23)

This shows that the flatlining / decline in bus passengers has not been seen across the other modes prior to the pandemic. Travel by rail increased by 70% by 2019/20, higher than the trend at the Scottish national level of 53% reflecting the increased provision in the region.[22]

In absolute terms though, in 2019/20, at the Scotland level there were **96.4 million** journeys made on ScotRail services and **361 million** journeys made by local bus, almost four times as many. Road travel saw a steady increase between 2004/5 and 2019/20, and both these trends highlight a 'revealed preference' of people moving away from the bus.

The onset of COVID-19 saw passenger numbers fall with rail and bus being impacted the most. Post COVID-19, by 2022-23 rail (-26%) and bus (-12%) were still substantially below pre-pandemic levels, whilst road travel had recovered to within 4% of pre-pandemic levels. The pandemic has undoubtedly had a structural impact on travel

[22] Chapter 7 - Rail | Transport Scotland

patterns, primarily through home / hybrid working and reduced business travel, which allied with suppressed travel by older concessionary pass holders appears to have had a disproportionate impact on use of public transport.

Key Insight: There has been sustained decline in bus passenger numbers compared to car (which grew steadily since the financial crisis in 2008-09) while rail had seen a very large increase before COVID-19. By 2022/23, bus and rail passenger numbers were still substantially below pre pandemic levels, yet road traffic levels had almost fully recovered. This implies a shift away from bus travel to these other modes.

PART 2B: USER EXPERIENCE AND PASSENGER SATISFACTION

Poor perceptions of bus travel by residents of the region may be a factor in the trend of declining bus use outlined above. The sections which follow therefore cover passenger satisfaction data for:

- SEStran local authorities
- Surveys undertaken as part of the RTS work
- SEStran region – Transport Focus

SEStran local authorities

The Scottish Household Survey (SHS) carries out satisfaction surveys for adults on whether they are 'very' or 'fairly satisfied' with public transport[23] for each council area.[24] The results from each SEStran local authority are shown in Figure 12 below for the decade prior to COVID-19. [25]

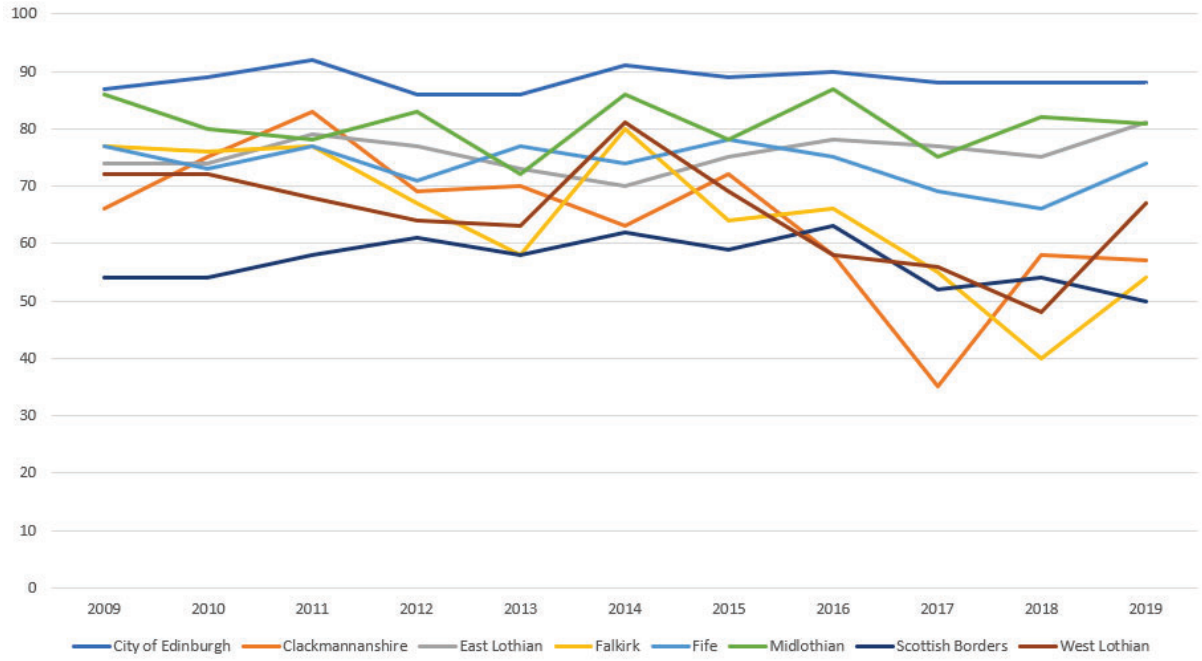


Figure 12: Percentage of adults reporting they are very or fairly satisfied with Public Transport

From 2009-2019 the City of Edinburgh has remained the area where public transport users have the highest levels of satisfaction with services (88%) but had only increased by one percentage point over this period. Satisfaction had fallen for all other council areas except East Lothian which saw an increase since 2014 to 81%. Falkirk saw the most significant drop of 23 percentage points whilst Clackmannanshire residents' satisfaction with public transport has also fallen by 9 percentage points. Scottish borders had the lowest satisfaction of all areas in 2019 of 50%, although Falkirk (54%) and Clackmannanshire (57%) were only a little better. On a straight average across the eight local authorities, **satisfaction by this measure had reduced from 74% to 69% in the decade prior to the pandemic**.

This data gives a useful insight into the public's perceptions before COVID-19. We can then compare this with Scottish Household Survey results from the local authorities in 2022, the most recent data, and this is shown in Figure 13 below.

[23] It is noted that this therefore includes rail, but as more people use the bus (especially in the SEStran region), bus will be the main factor here
[24] Data excludes those with no opinion
[25] statistics.gov.scot

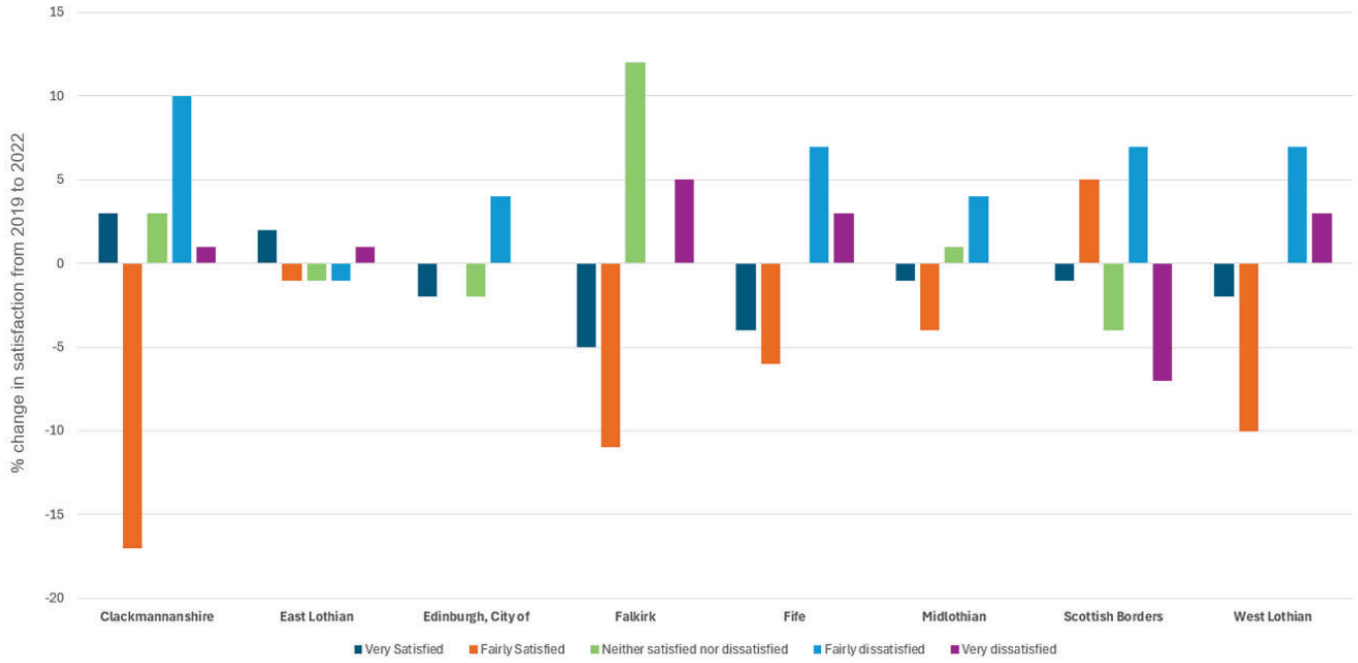


Figure 13: Scottish Household Survey results from the SEStran council areas, 2022 compared to 2019

It is notable that there have been sharp drop-offs in satisfaction levels in Falkirk (-16 percentage points), Clackmannanshire (-14), West Lothian (-12) and Fife (-10) between 2019 and 2022. Indeed, Falkirk has the highest proportion of dissatisfaction with public transport services of 33% ('fairly dissatisfied' plus 'very dissatisfied'). Edinburgh still has the highest satisfaction levels with of 86% ('very satisfied' plus 'fairly satisfied') followed by East Lothian (82%) and Midlothian (76%) – with all three areas being mainly served by Lothian Buses at that time. Fife sees the highest satisfaction levels of the other councils.

As an average across all the local authorities, satisfaction dropped sharply from 69% in 2019 to 62% in 2022.The SHS also asks bus users whether they agree or disagree with a range of 10 positive statements about bus services. The results from 2021 (the latest year) are shown in Figure 14 below.

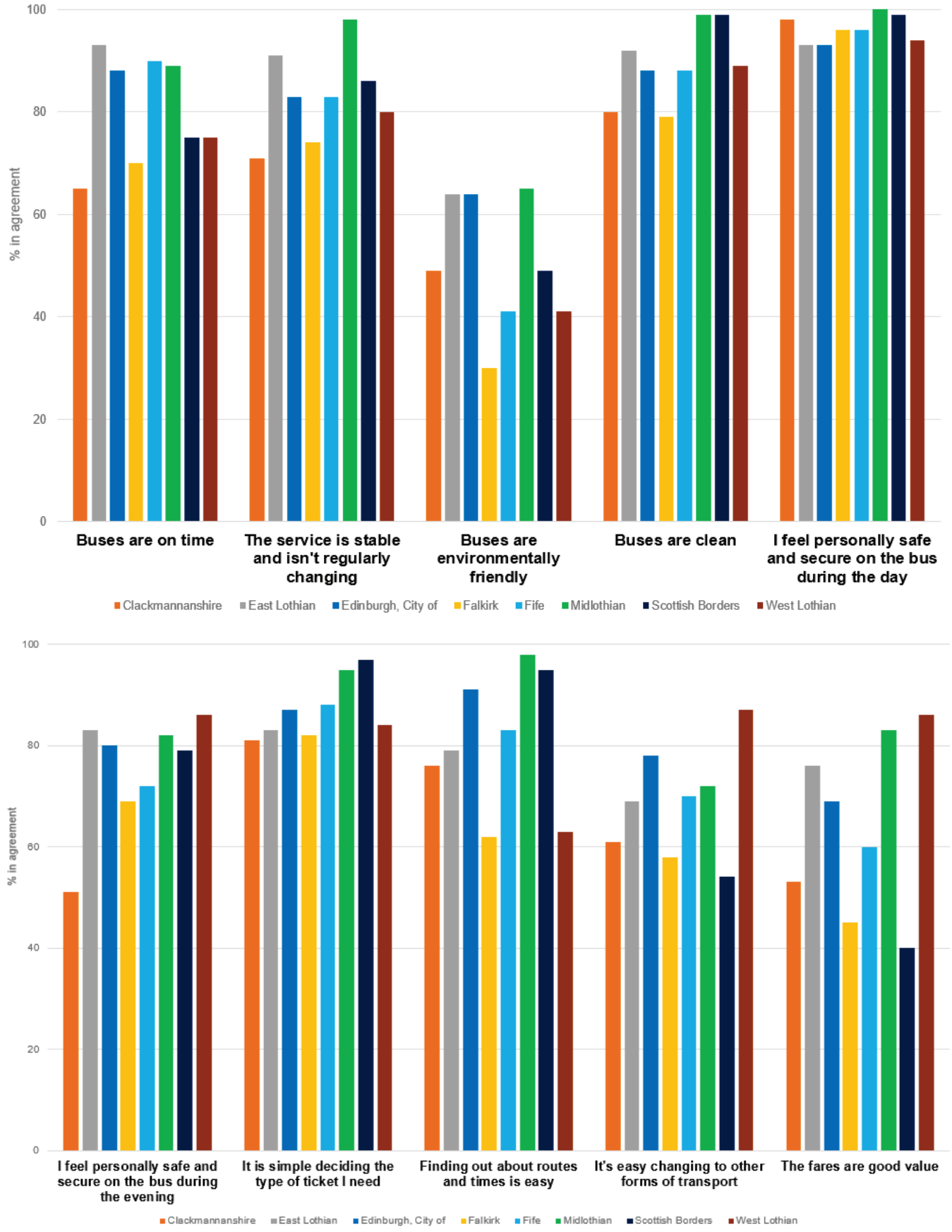


Figure 14: Scottish Household Survey, % agreeing with each statement, 2021

It can be seen that there is significant variation across the council areas with respect to most of the statements, underlining that the perception of bus services varies widely across the region, with the caveat that sample sizes for some local authorities are small. Overall, the highest levels of non-agreement were 'buses are environmentally friendly' (particularly low in Falkirk, Fife and West Lothian), 'the fares are good value' (particularly low in Scottish Borders, Falkirk and Clackmannanshire) and 'it's easy changing to other forms of transport' (also lowest in Borders, Falkirk and Clackmannanshire).

RTS Surveys

Engagement with the region's residents (non-bus users) undertaken during the development of the RTS asked what factors were most important to them in their choice not to travel by bus. The results are shown in Figure 15 below.26

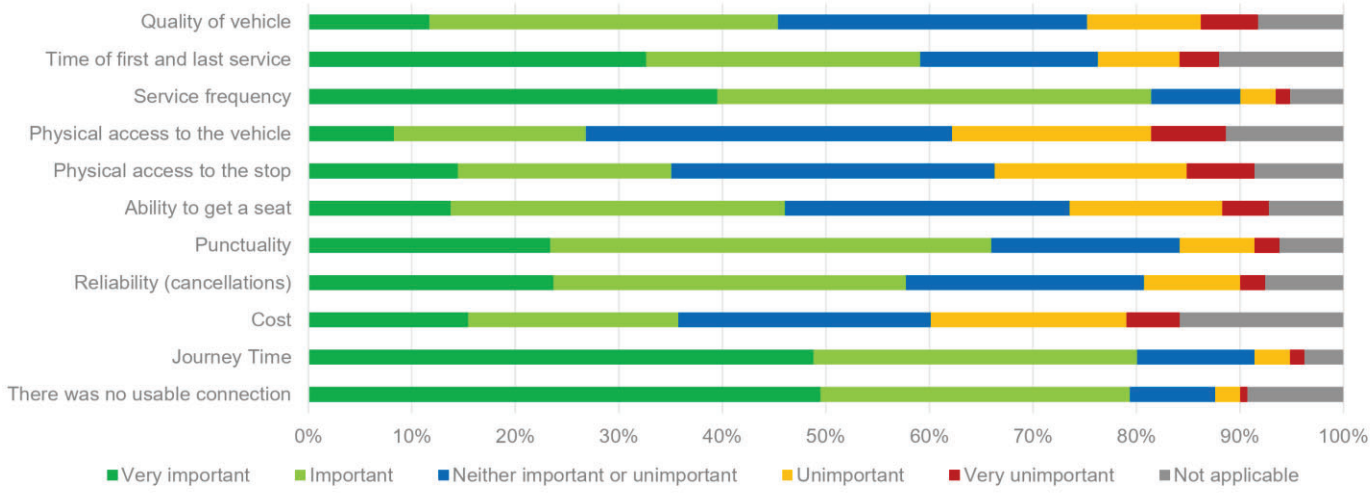


Figure 15: Factors influencing decision on whether to travel by bus, SEStran RTS

The respondents who chose not to travel by bus reported 'the lack of useable connections', 'bus journey times', 'the frequency of services', and 'the time of first and last services' as the most significant factors as to why they did not use the bus. These are therefore the most vital issues that need improving to encourage a modal shift away from the private car towards bus travel. The issue of long bus journey times compared to other modes is identified in the RTS and returned to later in this report. This is acknowledged by the operator Lothian buses, who attribute this issue to congestion, road space allocation, and the resulting impact on the reliability of services. The issue of congestion is identified as an issue across the SEStran region by the City of Edinburgh Council, Falkirk Council, and Fife Council.

From surveys carried out of bus users as part of the RTS, a quarter of people were dissatisfied with the value for money for services provided in the SEStran region. This is a key factor affecting those on low incomes who are more likely to take the bus, whereas those on higher income will be more likely to drive or use rail services. Other problems related to public transport services reportedly experienced by users include:

- People sometimes cannot get a seat on public transport services
- Some journeys cannot be made by public transport – this causes the higher car ownership seen in remote rural areas
- Vulnerable groups do not feel safe on public transport
- People do not have awareness of all public transport options

Transport Focus - Your Bus Journey 2023

The 2023 Your Bus Journey results for the SEStran region were published in April 2024. The survey is run by Transport Focus, an independent consumer organisation representing the interests of transport users across the country.

Passengers provide their feedback about a single leg of a journey, made on the day of recruitment. It should be noted that as Transport Focus recruit passengers as they make their journeys at bus stops and on-board buses,[27] the analysis clearly only focuses on people who already use bus and who are therefore more likely to feel more

[26] SEStran-RTS-Case-for-Change-v3.3.pdf
[27] Data is weighted according to whether passengers were approached at bus stops or on board a bus to ensure there is a 50:50 split in all areas.

positive about their experience than those that don't. The survey questions focus initially on measures of satisfaction with more detailed questions that are optional but encouraged.[28]

In SEStran, 457 responses were received, while in Scotland, 3,053 responses were received. While data is not reported at local authority level, it is worth noting that Transport Focus has highlighted the number of responses per operator. The majority of responses were made on or waiting for Lothian Buses (63%) suggesting a large of share of respondents were made on routes starting in or near Edinburgh. The next highest proportions of responses were for operators Stagecoach (15%), East Coast Buses (9%) (a subsidiary of Lothian Buses) and McGills (7%).

The Transport Focus survey results for the SEStran region highlight:

- As shown in Figure 16, over the full year, value of money satisfaction scored the lowest (68%) whereas satisfaction with bus drivers scored the highest (87%).
- Figure 17 highlights bus satisfaction levels within different groups. Those aged 16-25 have the lowest levels of satisfaction with only 36% being 'very satisfied', which is the lowest among the different users.
- When comparing SEStran to Scottish satisfaction levels, Figure 18 shows that SEStran scores lower in 'the bus stop where you caught the bus' category.

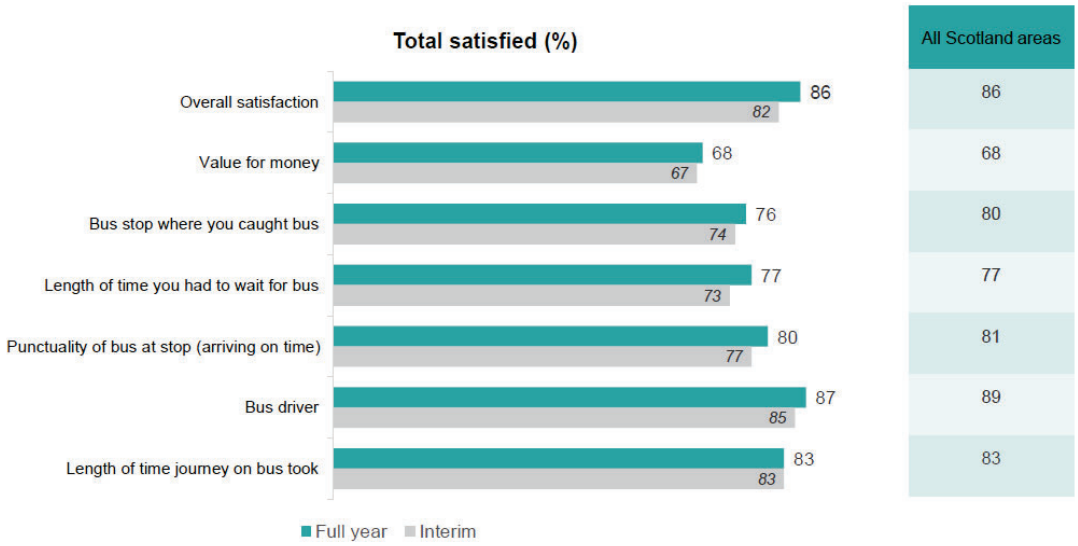


Figure 16: SEStran bus satisfaction levels – Your Bus Journey

[28] Data has been weighted to be representative of the demographics of passengers by gender and age and journey time banding. Data is based on journeys rather than passengers, so frequent users are more likely to be sampled.

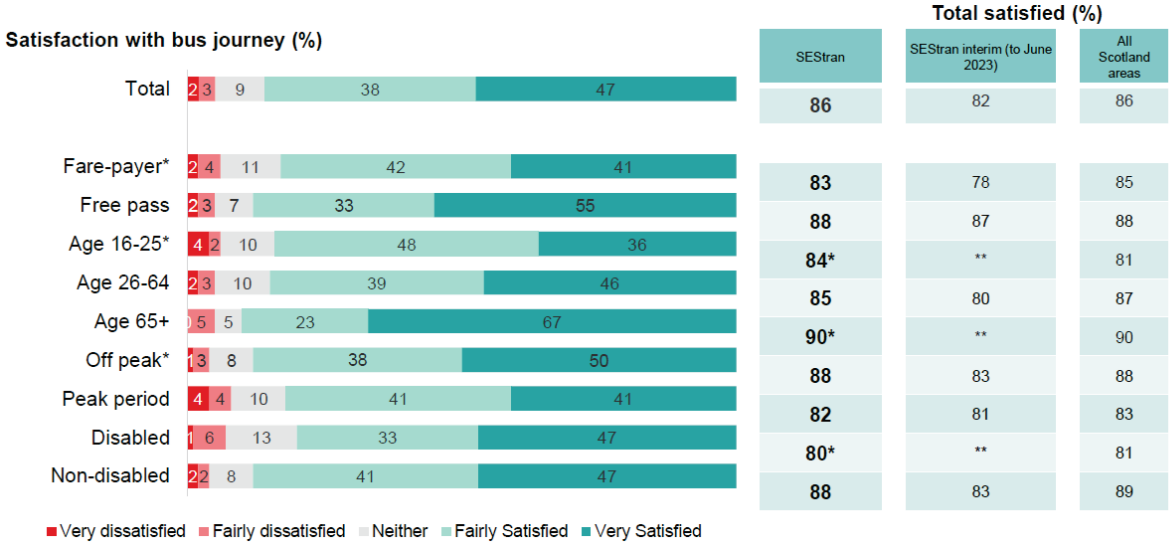


Figure 17: SEStran bus satisfaction levels – different users

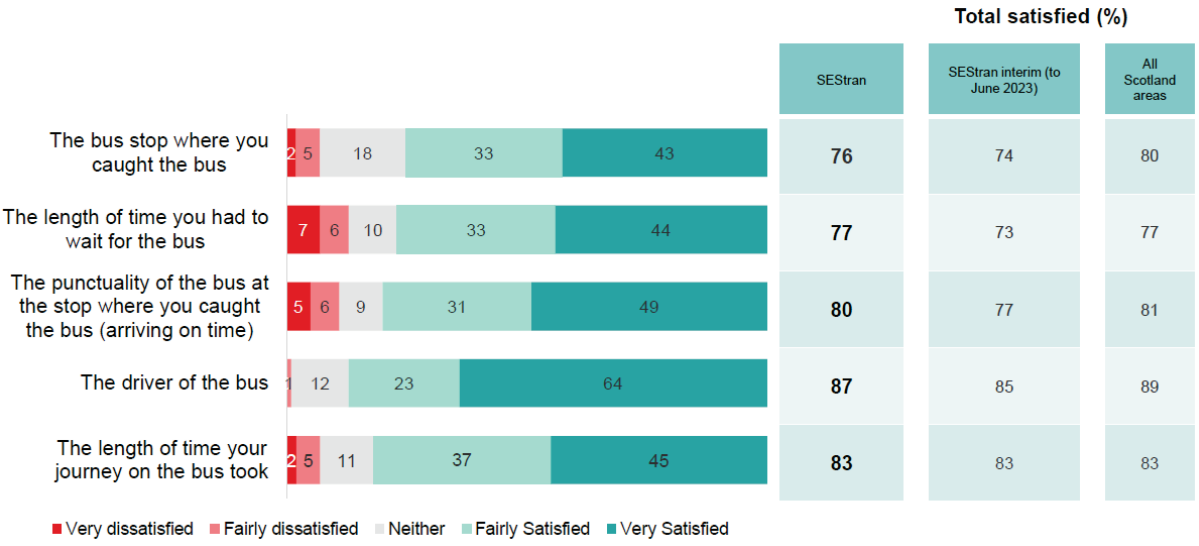


Figure 18: SEStran bus satisfaction levels – aspects of service

In Autumn 2018, Transport Focus undertook bus passenger satisfaction surveys across a number of different bus operators throughout Scotland.[29] Analysis of these surveys showed that 95% of users of Lothian Buses were at least fairly satisfied with bus journeys. Over 1,000 Lothian Buses users were surveyed and over half (56%) of these were very satisfied with their bus journey. Lothian Buses was the second-best performing operator in Scotland in terms of satisfaction behind Stagecoach in the Tayside and Central region. First Scotland East, which no longer operates in the SEStran region, were the only other operator in the region to have passenger journey surveyed, 89% of users were at least fairly satisfied with bus journeys.

[29] Bus-Passenger-Survey-Autumn-2018-summary-of-key-results-in-Scotland.pdf (d3cez36w5wymxj.cloudfront.net)

Key Insight: Averaged across the local authorities, satisfaction with bus services has dropped from 74% in 2009 to 62% in 2022. There is significant variation across the region with reductions in satisfaction in seven council areas - the biggest seen in Falkirk and Clackmannanshire, a small drop in Edinburgh and an increase in East Lothian. These trends reflect the disparity in service provision across the region and the perceptions of aspects of the services also varies widely.

For bus and non-bus users the key issues surrounding bus services are:

- the length of time journeys can take in comparison to the same journey by private car
- the high number of interchanges needed for some routes
- the lack of serviceable connections
- value for money of services

PART 3A: BUS SERVICES AND NETWORK - OVERVIEW

This section sets out some the key features of the current bus network and services across the SEStran region, providing an understanding of the supply side (including presenting the range of operating commercial and supported services, where they operate, service frequencies etc.). The sections which follow cover:

- Bus network, overall and by local authority
- Commercial and supported service coverage

For each of the maps in this section we have produced image zoomed in on Edinburgh. These can be found in appendix A.

The Bus Network

The figures below, showing the whole region followed by an image zoomed in on Edinburgh, provide an overview of the extent of the 2023 bus network across the region. The wider bandwidths and darker greens indicating greater service frequencies.

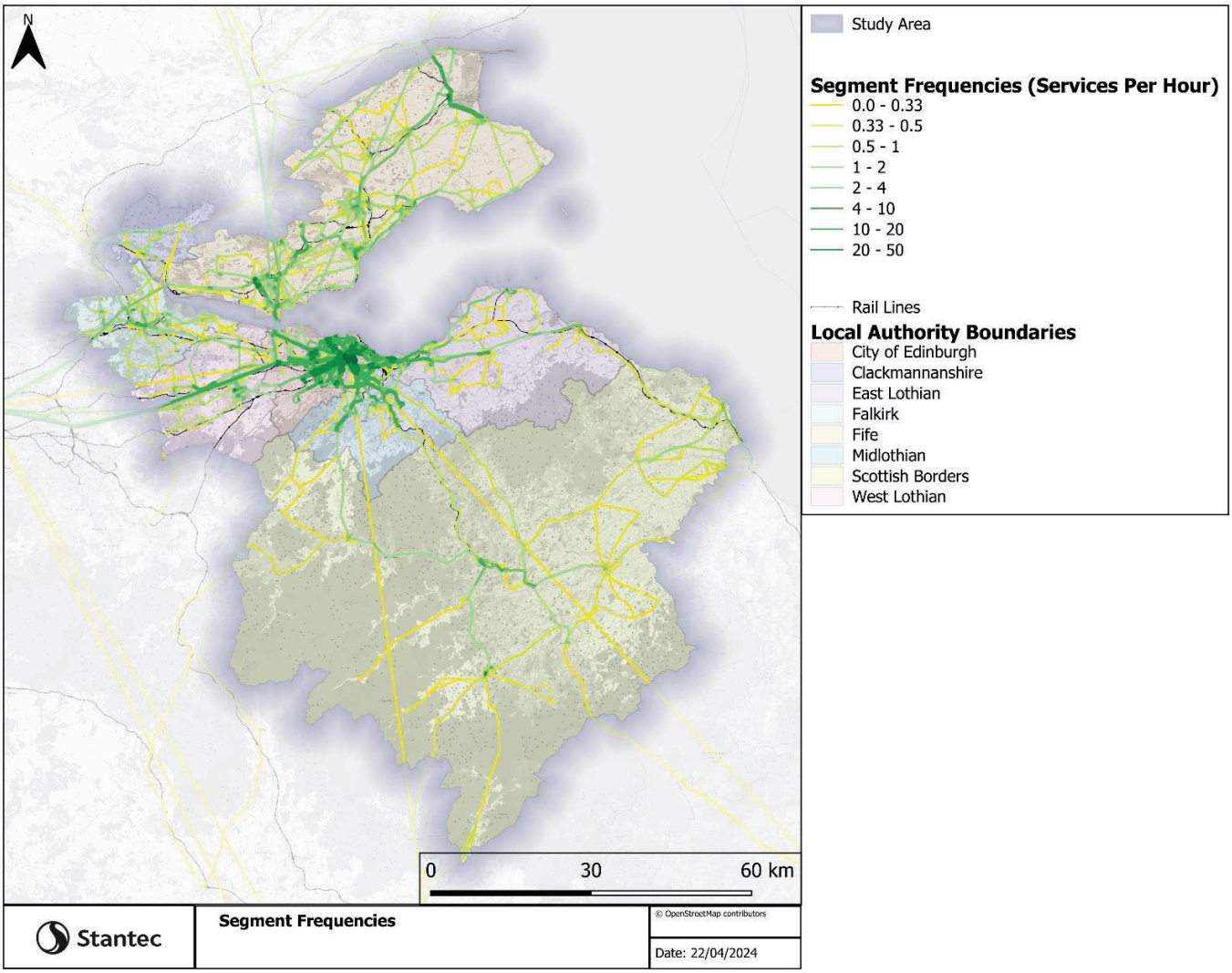


Figure 19: Number of bus services per day in SEStran region

This provides an overview visualisation of network coverage across the region and highlights high numbers of buses on the strategic corridors into Edinburgh as well as within the main settlements in Fife (Dunfermline, Kirkcaldy, Glenrothes) and others. There are also a notably large number of services spreading into Midlothian and the west of East Lothian and between Dundee and St Andrews.

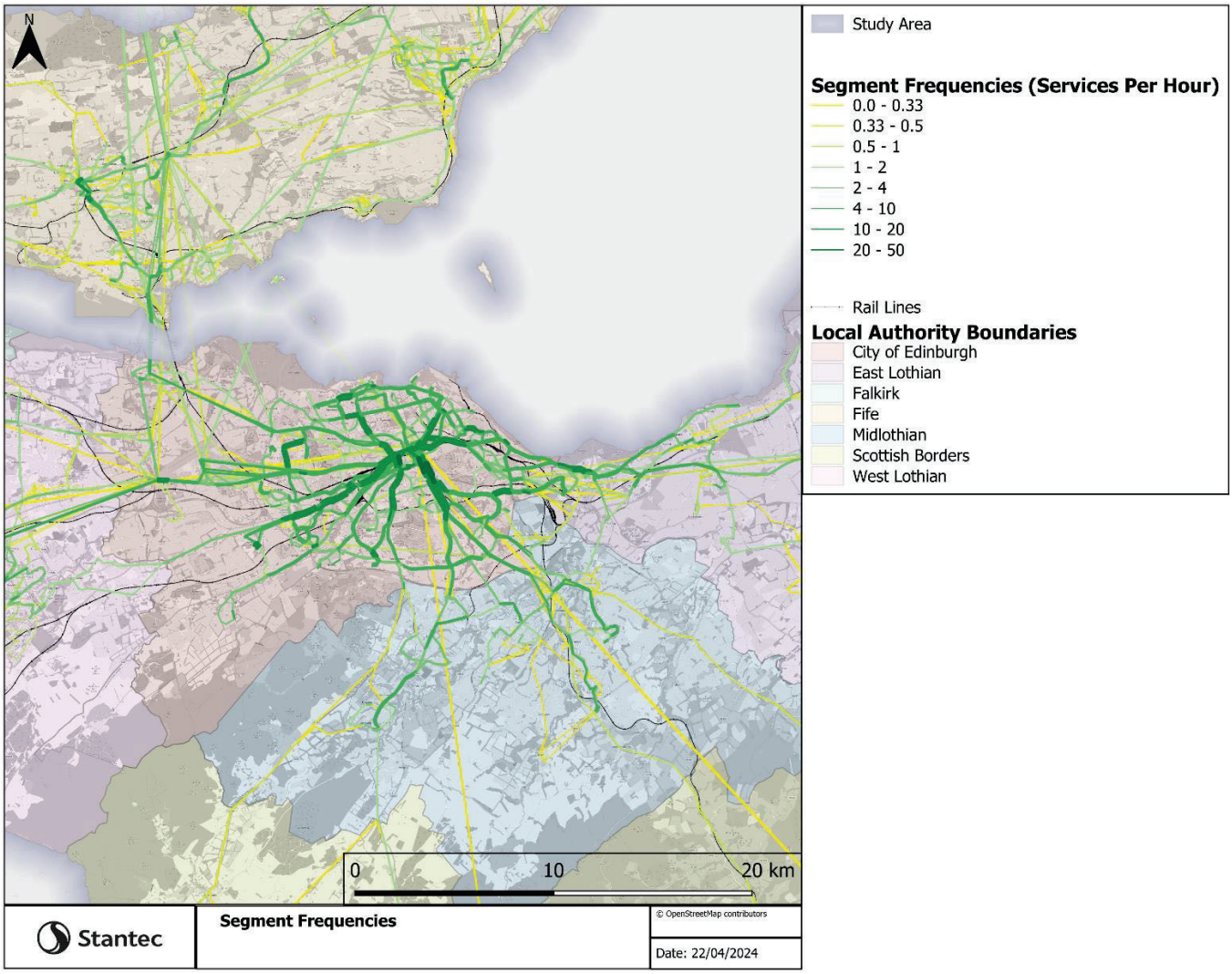


Figure 20: Number of bus services per day in SEStran region (zoomed)

The zoomed in image demonstrates the largely radial nature of the network in and around Edinburgh with services from outside Edinburgh funnelling into the A90, A8, A71, A702, A7 and A1 corridors onto the city. Whilst there are some orbital connections, these are much less extensive than the radial services. There are no bus services on the City Bypass.

Key Insight: Many regional bus services across the area are Edinburgh-focussed and options for bus for travel between local authorities outside of Edinburgh are limited. Even within Edinburgh services are heavily focussed on radial corridors with more limited orbital services.

Figure 22 to Figure 29 below highlight the number of services per day with at least one stop in each of the eight local authorities in the SEStran region, with thicker bandwidths representing higher bus volumes. These figures show that generally, outside of connections into Edinburgh, connections amongst the other authorities are limited. This is supported by Travel to Work data which shows a large number of car trips for travel in and between the other local authorities in the region.

In addition, road-based travel between Scotland's local authorities, as represented by Transport Scotland's Transport Model for Scotland (TMfS), was analysed during the development of the RTS. Figure 5.15 from the RTS is reproduced in Figure 21 below.

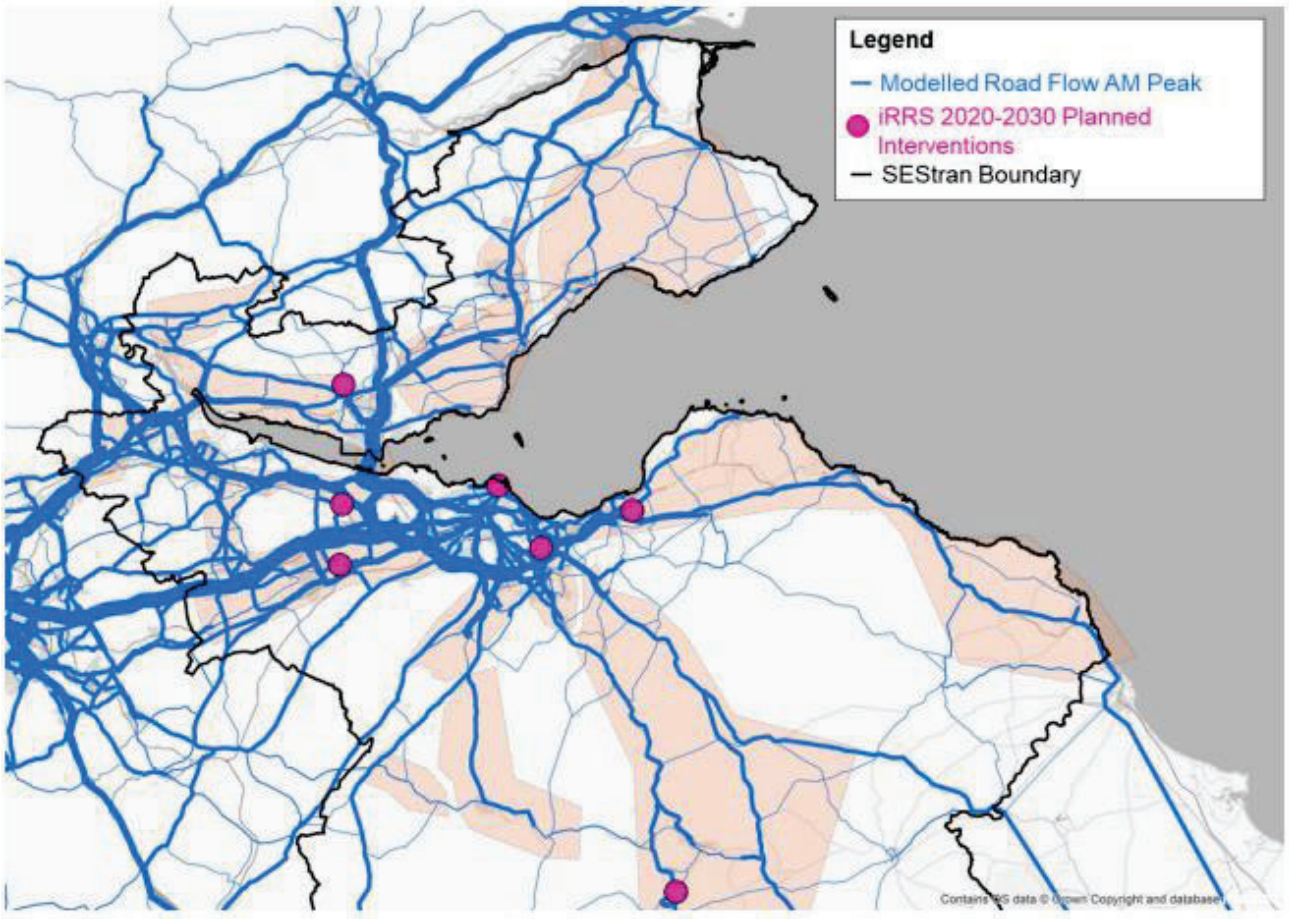


Figure 21: Regional Road Network Demand (TMfS)

This figure shows the extensive modelled distribution of road-based travel between the local authorities. There is clearly scope for more of these trips to be made by bus.

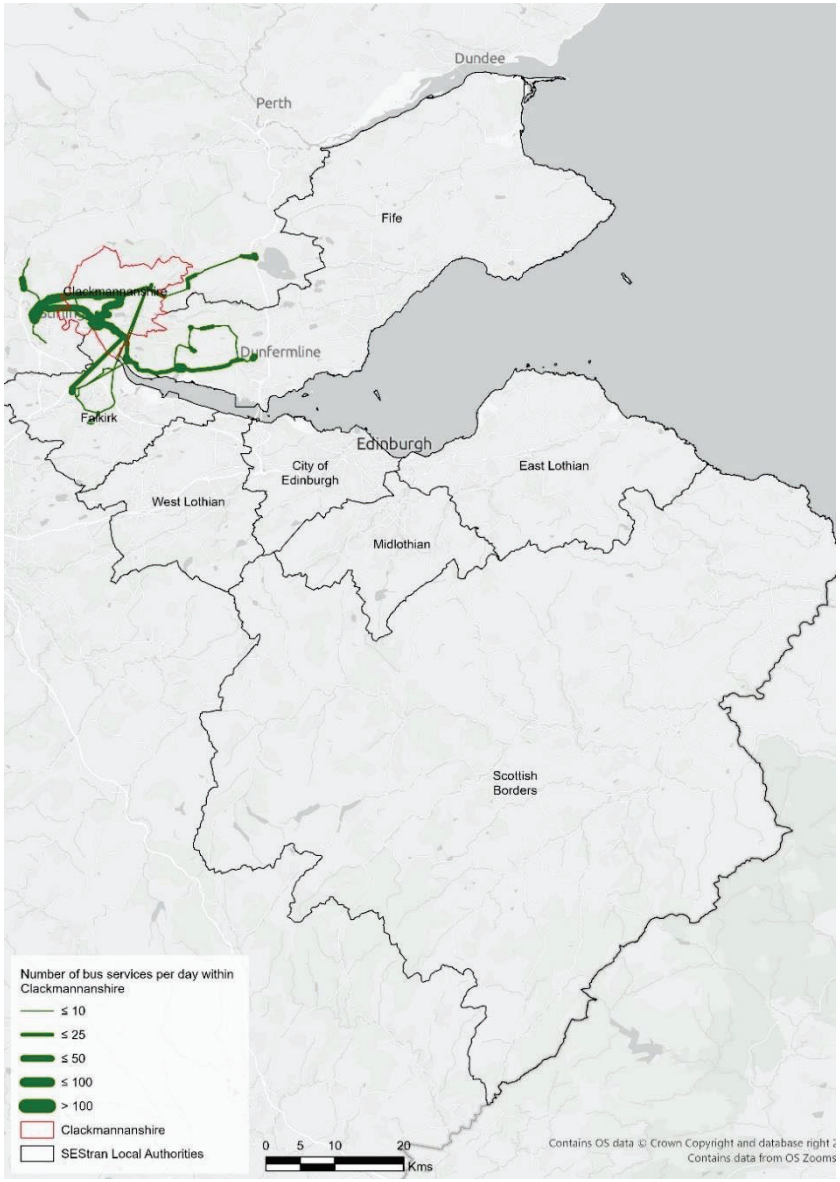


Figure 22: Number of bus services per day in Clackmannanshire

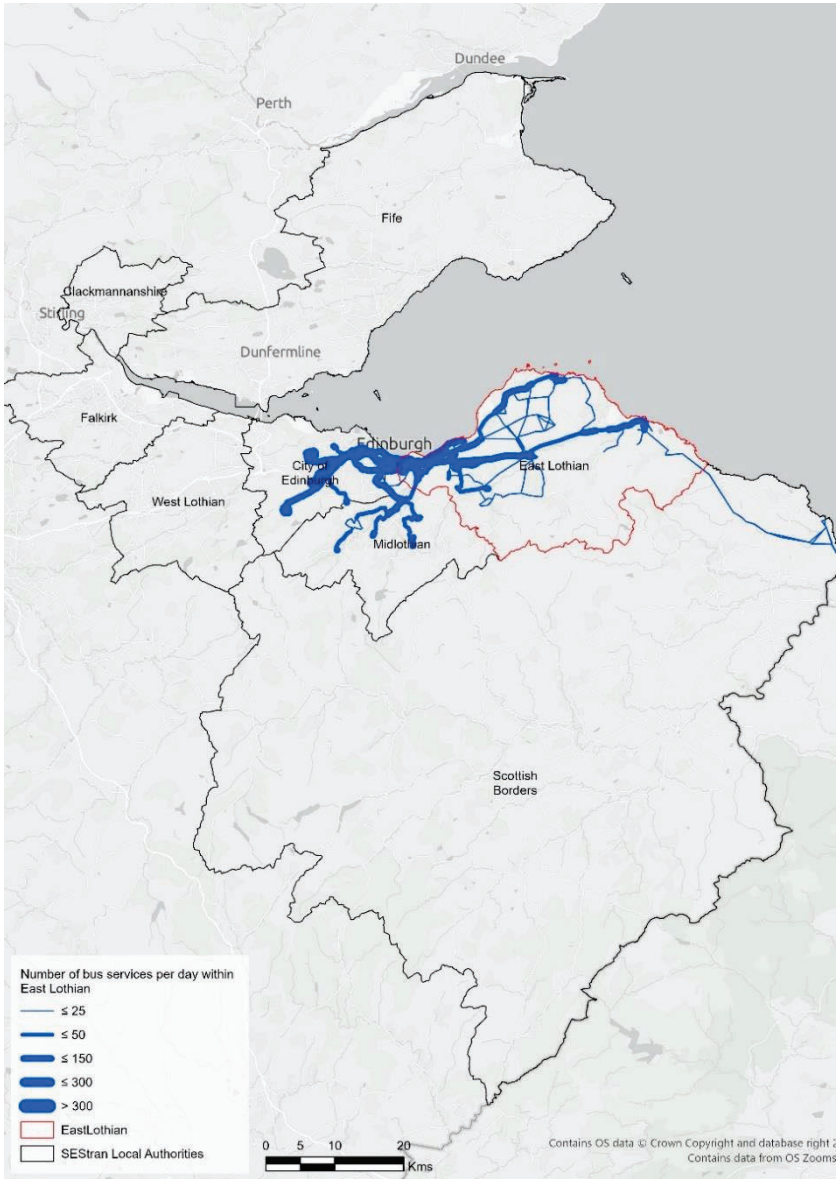


Figure 23: Number of bus services per day in East Lothian

151 The Alloa / Tillicoultry / Stirling triangle forms the bulk of the services. External connections limited to west Fife, Falkirk and Kinross. No direct connections to West Lothian or locations east of this.

Services are focussed between Edinburgh and the highly populated areas in the north and west of East Lothian and the A1 / A198 corridors, with some limited connections into Midlothian. Limited connections to north and west Edinburgh.

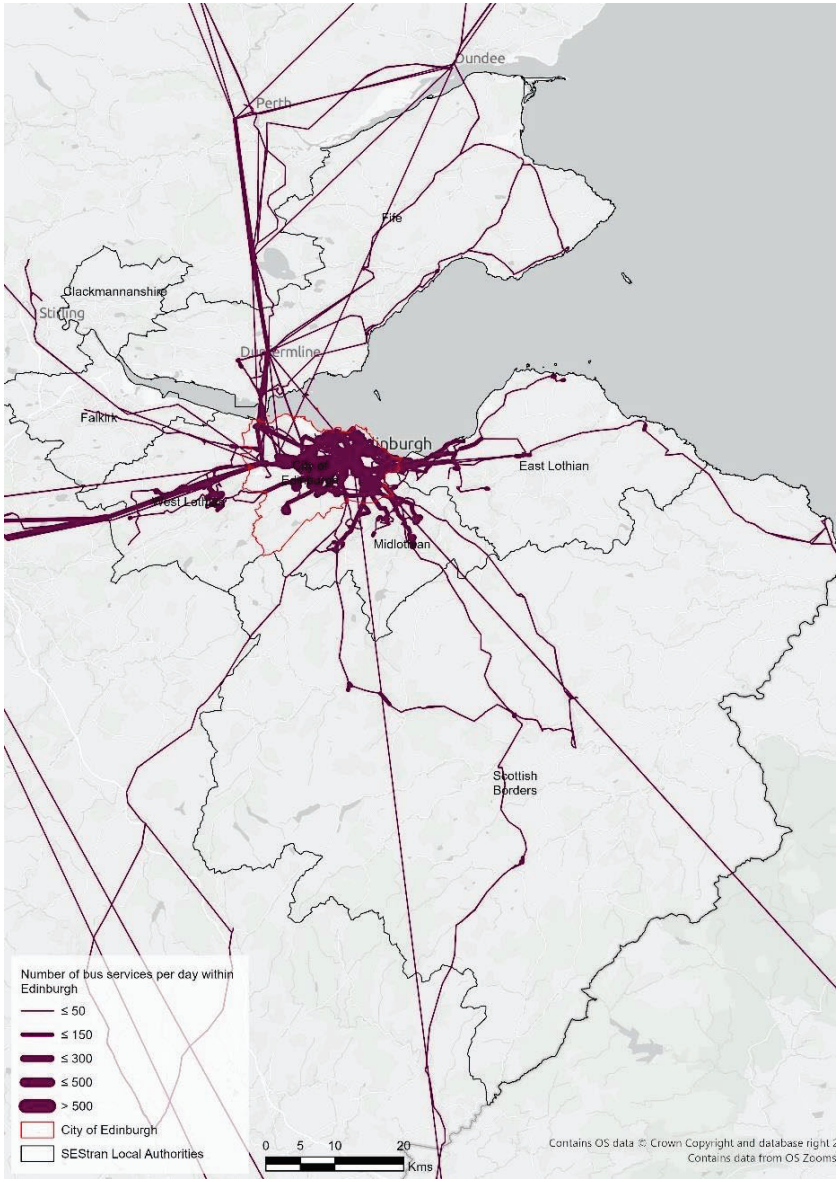


Figure 24: Number of bus services per day in City of Edinburgh

The extent of bus connections between Edinburgh and the region's towns is shown. There are no direct connections to much of Falkirk, any of Clackmannanshire, west Fife and a swathe of the central Borders.

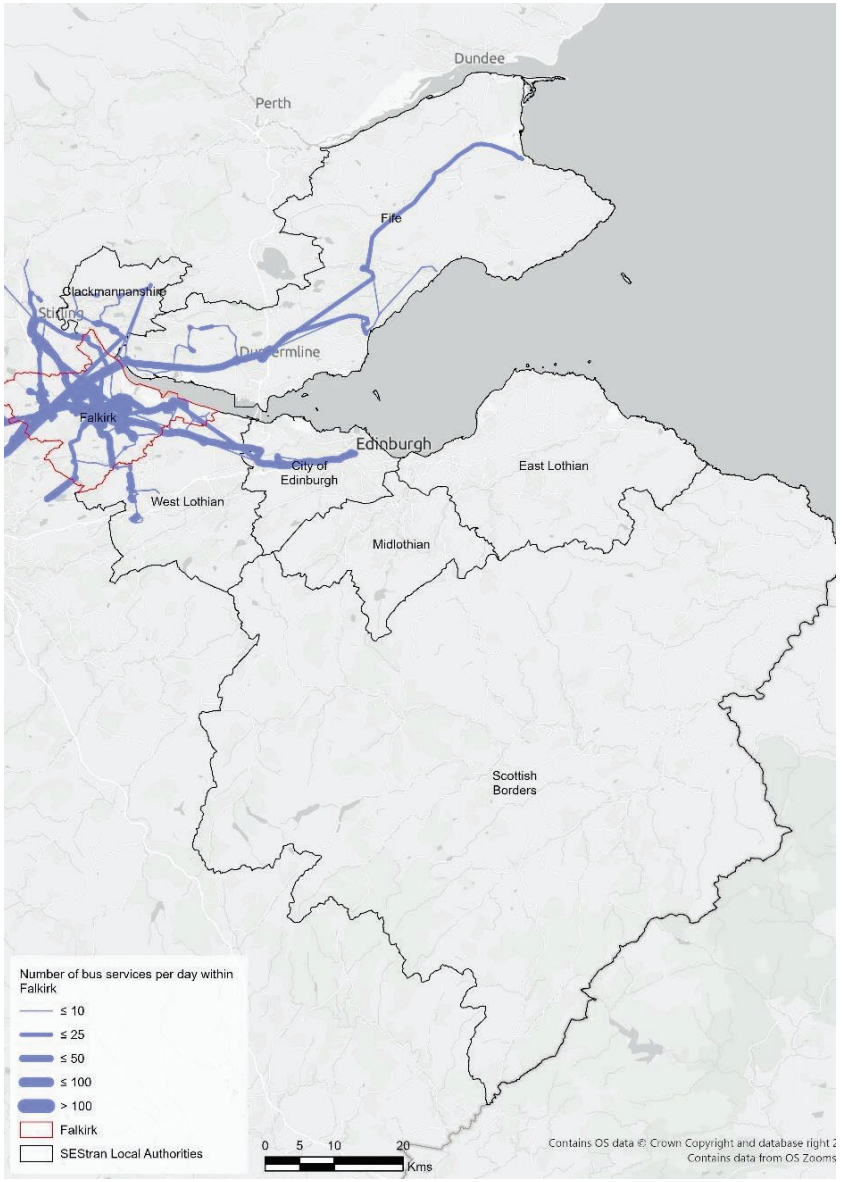


Figure 25: Number of bus services per day in Falkirk

Falkirk has good connections to Stirling, and through the M9 corridor to west and central Edinburgh. Glasgow-St Andrews services provide connections through central Fife. Connections to neighbouring West Lothian are very limited.

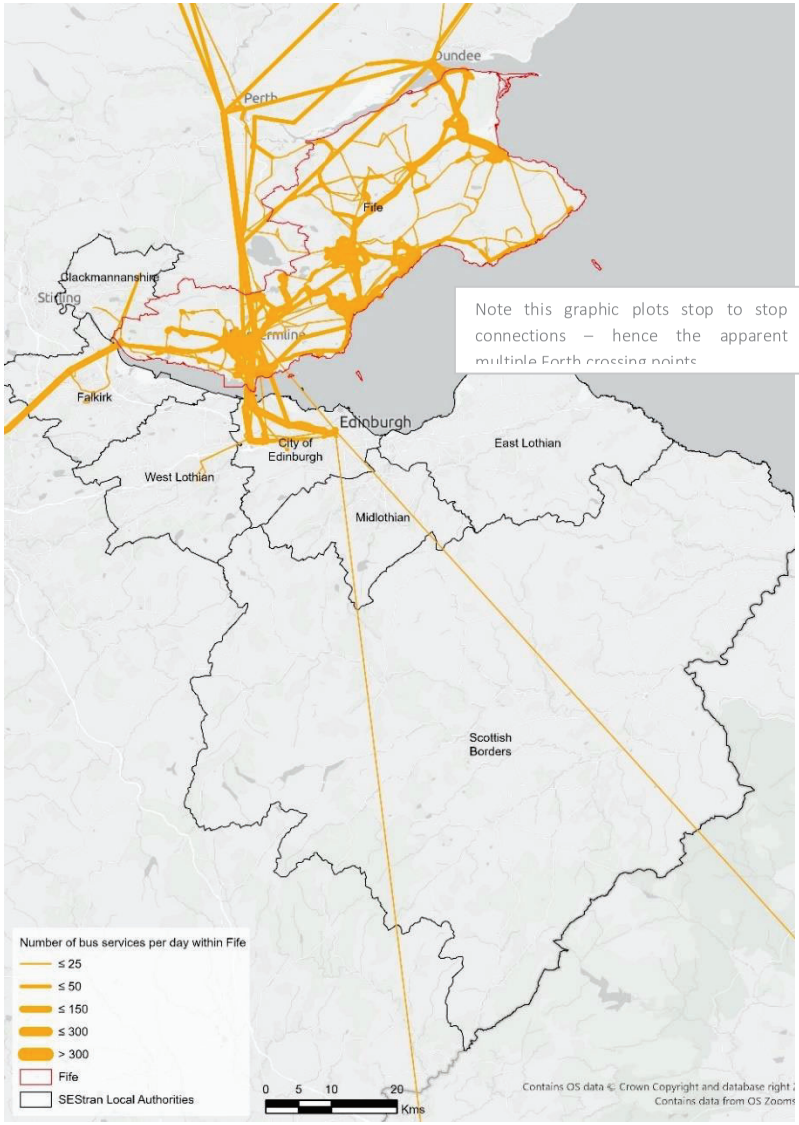


Figure 26: Number of bus services per day in Fife

The main Fife towns of Dunfermline, Kirkcaldy, Buckhaven/Methil/Leven and Glenrothes appear well connected. Services to Edinburgh mainly serve the A90 corridor so no connection to north, east or south Edinburgh. Note that the graphic plots stop to stop connections – hence the apparent multiple Forth crossing points.

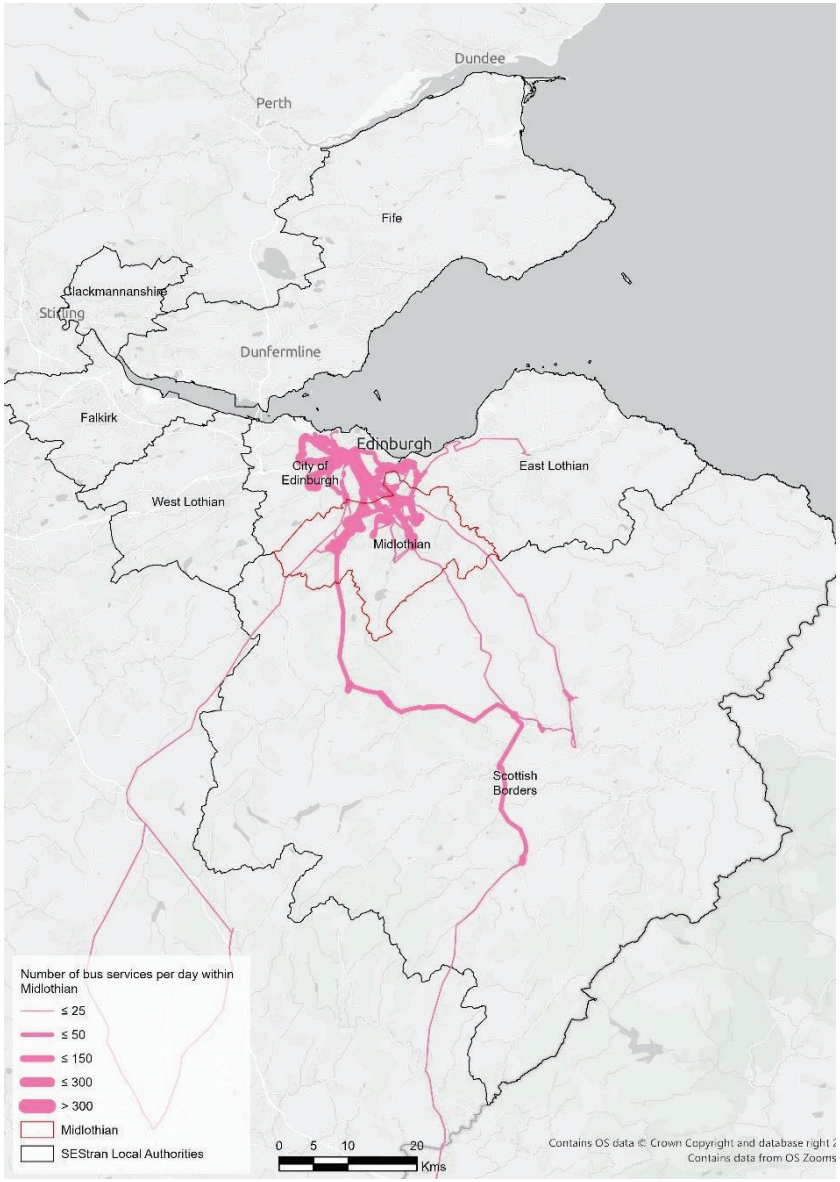


Figure 27: Number of bus services per day in Midlothian

Thers is a large concentration of services in Midlothian funnelling into the Bridges corridor in Edinburgh. There are no connections to north Edinburgh and links to the west are via the city centre. East-west connectivity in Midlothian is limited.

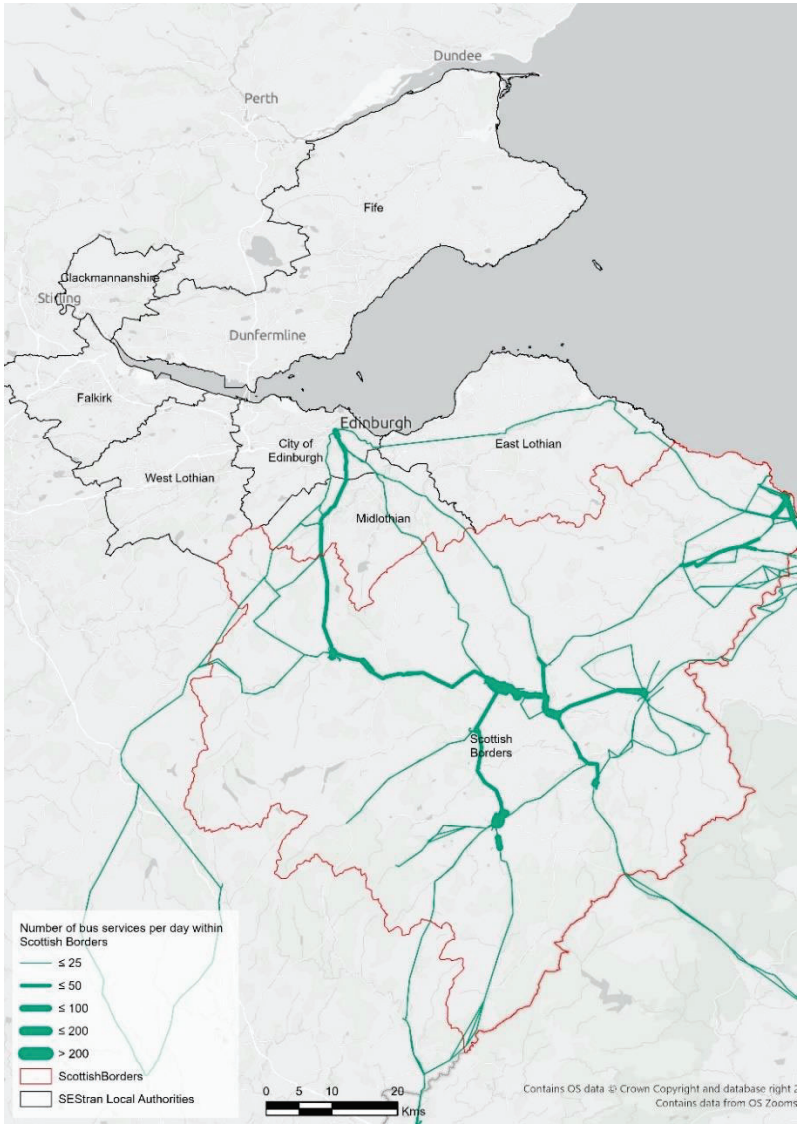


Figure 28: Number of bus services per day in Scottish Borders

There is a concentration of services in the central Borders linking Galashiels, St Boswells, Kelso and Jedburgh. The Galashiels-Peebles-Edinburgh link is the highest frequency connection to Edinburgh. The Borders Railway largely provides for the A7 corridor. Links between the central Borders and Berwickshire are more limited.

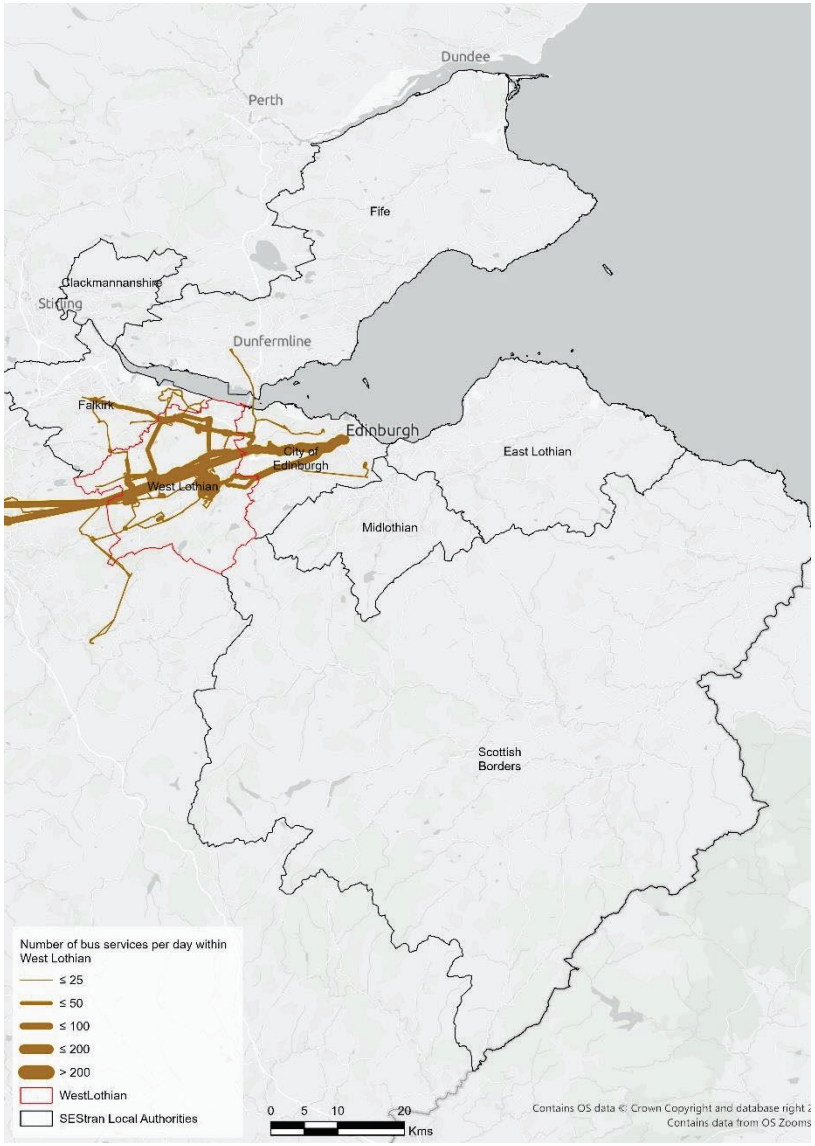


Figure 29: Number of bus services per day in West Lothian

The West Lothian network appears quite sparse and very much focussed on the main east-west corridors (A71, M8/A89 and M9), and often as part of longer distance routes. Connections are limited outwith these corridors.

Commercial and Supported Services

The scheduled bus network shown above is a mixture of commercial and subsidised services, with local authorities supporting socially necessary services where there is no commercial service and a clear need for public transport connectivity is identified. The figures below show firstly the commercial, then the subsidised network in 2024, and clearly highlight the limited range and extent of the commercial bus network compared to the network as a whole, especially in less densely populated parts of the region.

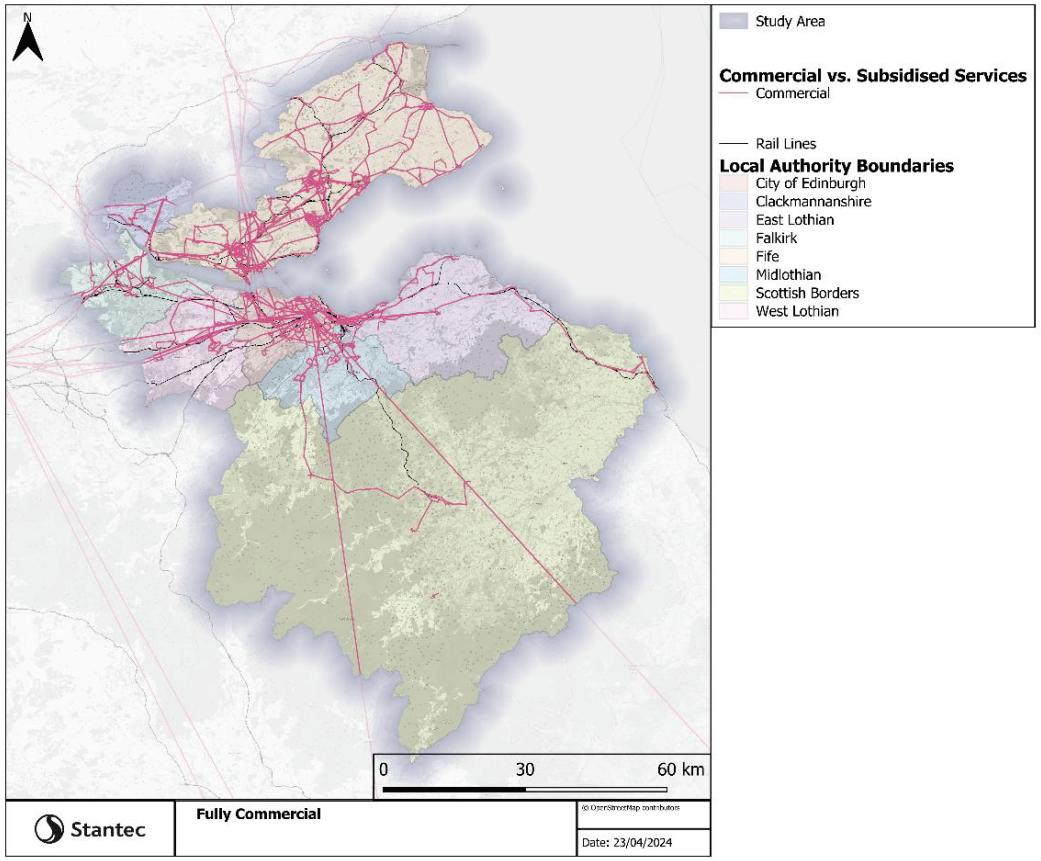


Figure 30: Commercial Bus Network: 2024

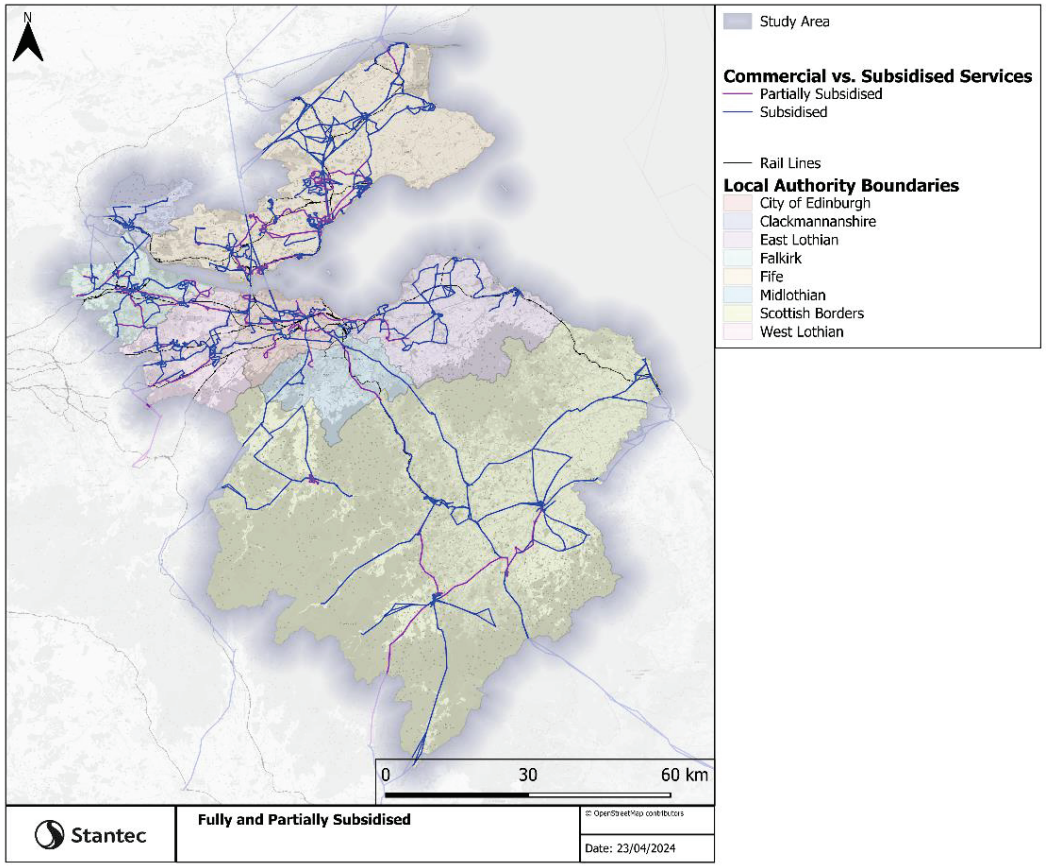


Figure 31: Subsidised Bus Network: 2024

The coverage of the commercial bus network diminishes considerably into rural parts of the region, including the Scottish Borders and eastern East Lothian.

Without public subsidy, many smaller communities would therefore not be served by scheduled bus services, most notably much of the Scottish Borders. There is an extensive partially or fully subsidised network across the region which supplements the commercial network. Partially subsidised services will mainly be additional late / early or Sunday services across the week.

At the Scotland level, pre-pandemic, around 19% of total bus kilometres were subsidised, a proportion which remained broadly unchanged over a number of years. The latest figure for 2022-23 is 16%.

The longer-term trend shown in Figure 32 below shows Scotland-level commercial and subsidised bus kilometres, indexed to 2000-01.

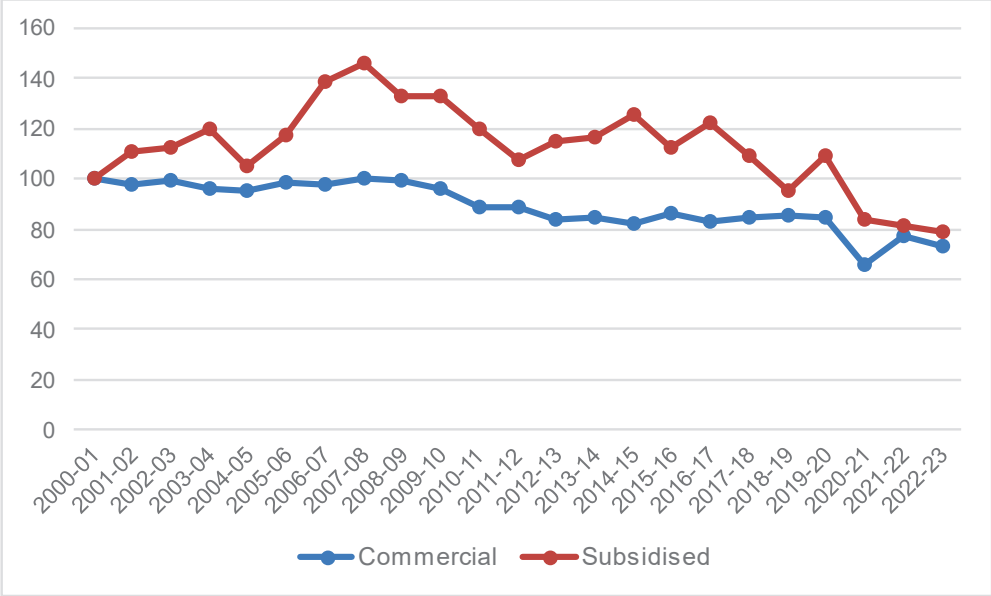


Figure 32: Subsidised and Commercial Bus Kilometres, 2000-2022

A contrasting picture is shown here with subsidised bus km rising from the turn of the century, then broadly falling after the 2008 financial crisis to 80% of the 2000 level in 2022-23. Today's figure is down 46% from the 2007 peak. Commercial bus km did not see the early growth in this period and instead have been on a broadly downward trajectory since 2000.

Key Insight: 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. Many rural communities would be without a bus service without these supported services. However, with no growth expected in local authority budgets, there is a risk that rural bus services, weekend services, and evening services will be reduced or withdrawn. At the Scotland level the quantum of subsidised bus km has reduced significantly over the last 15 years or so.

PART 3B: BUS SERVICES AND NETWORK – CONNECTIVITY ANALYSIS

The level of connectivity provided by the network of services is a key factor in determining passenger numbers, with Figure 15 showing that around 80% of people saying they do not use the bus as there is 'no usable connection'. To provide a regional overview of the bus network, including both accessibility to the network itself, as well as the connectivity provided by the services, detailed spatial analysis has been undertaken at full-postcode level.

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

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.

The following sections therefore consider:

- Household access to bus stops
- Weekday service frequencies
- Weekday direct connections to Edinburgh and other cities
- Weekday evening services
- Sunday services
- Car and bus journey time comparisons
- Network delays and their impact on the delivery of services
- Bus punctuality and journey time reliability
- Analysis of connectivity and deprivation

Access to a Bus Stop

Postcode analysis has been used to consider 'accessibility to the bus network', determined through consideration of the Scottish Government's Urban Rural 6-fold classification.[30] Postcodes with a classification of 1 (larger urban areas) or 2 (other urban areas) are considered to have convenient access to a bus stop if they are located within a 400m walk of a stop (in line with national guidance on the maximum desirable walking distance to a stop). For postcodes classified as 3 (accessible small towns) or 4 (rural small towns), convenient access has been defined as being within a 600m walk of a bus stop. Postcodes falling into the classification categories 5 (accessible rural areas) or 6 (remote rural areas) are deemed to have convenient access if there is a bus stop within an 800m walk. These walk distances have been established using postcode centroids and a representation of street and path networks.

Under the walk catchment bands as defined above, the analysis identified that 4% of households across the region do not have convenient access to a bus stop (as shown in Figure 33).

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

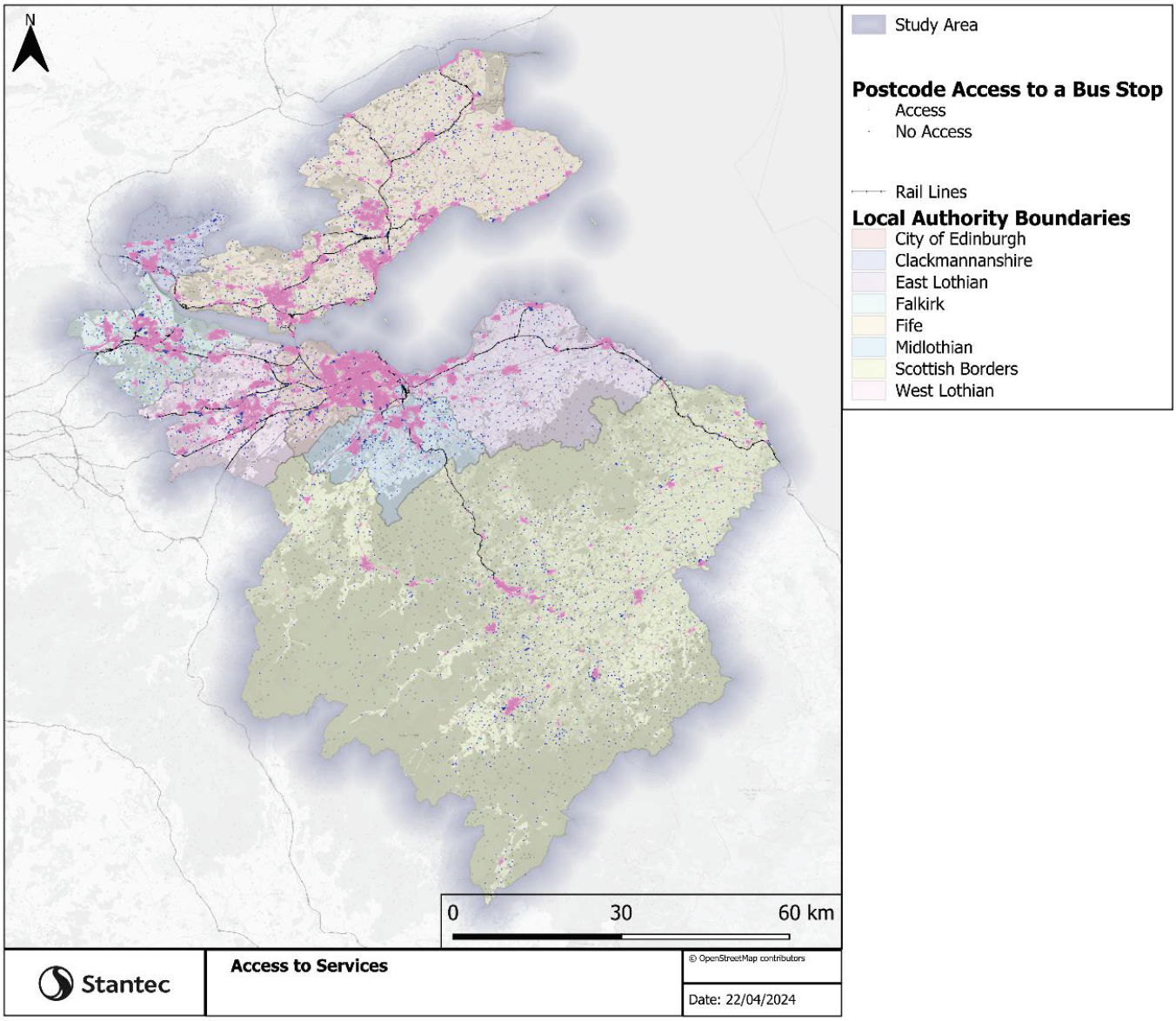


Figure 33: Access to bus stops

As can be seen from the map, those without convenient access to a bus stop (under the defined walking catchments) are generally located around the edge of towns (e.g., Stenhousemuir, North Berwick, Livingston, Balerno), in smaller villages (e.g., Howgate, Cousland, Lilliesleaf, Pool of Muckhart, and in the more dispersed rural areas across the region.

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

Table 1 shows the figures at the local authority level and these range from 1% in the City of Edinburgh to 15% in the Scottish Borders local authority areas. These relatively low figures reflect the fact that around 95% of SEStran residents live in defined settlements of more than 500 people.

Table 1:SEStran LAs households outwith access to a bus stop (%)

Local Authority	% households outwith access to a bus stop (under defined walk catchments)
Clackmannanshire	5%
East Lothian	6%
City of Edinburgh	1%
Falkirk	3%

Local Authority	% households outwith access to a bus stop (under defined walk catchments)
Fife	2%
Midlothian	4%
Scottish Borders	15%
West Lothian	4%
SEStran	**4%**

Key Insight: Access to the bus network is generally good as only 4% of households across the region don't have access to a bus stop within convenient 'catchment' walking distance. The Scottish Borders is the exception to this which reflects the more rural and dispersed nature of the area compared to the rest of the region. Being able to conveniently access a bus stop is therefore likely less of key problem a factor in determining bus use in the SEStran region, although clearly it is an issue for those affected.

Weekday Service Frequency

Infrequent services can be a barrier to bus use as this can lead to lost time at either end of the journey and greater inconvenience for someone missing a bus, or in the event of a service being cancelled.

Figure 34 below shows the weekday service levels across the region by percentage of SEStran households.

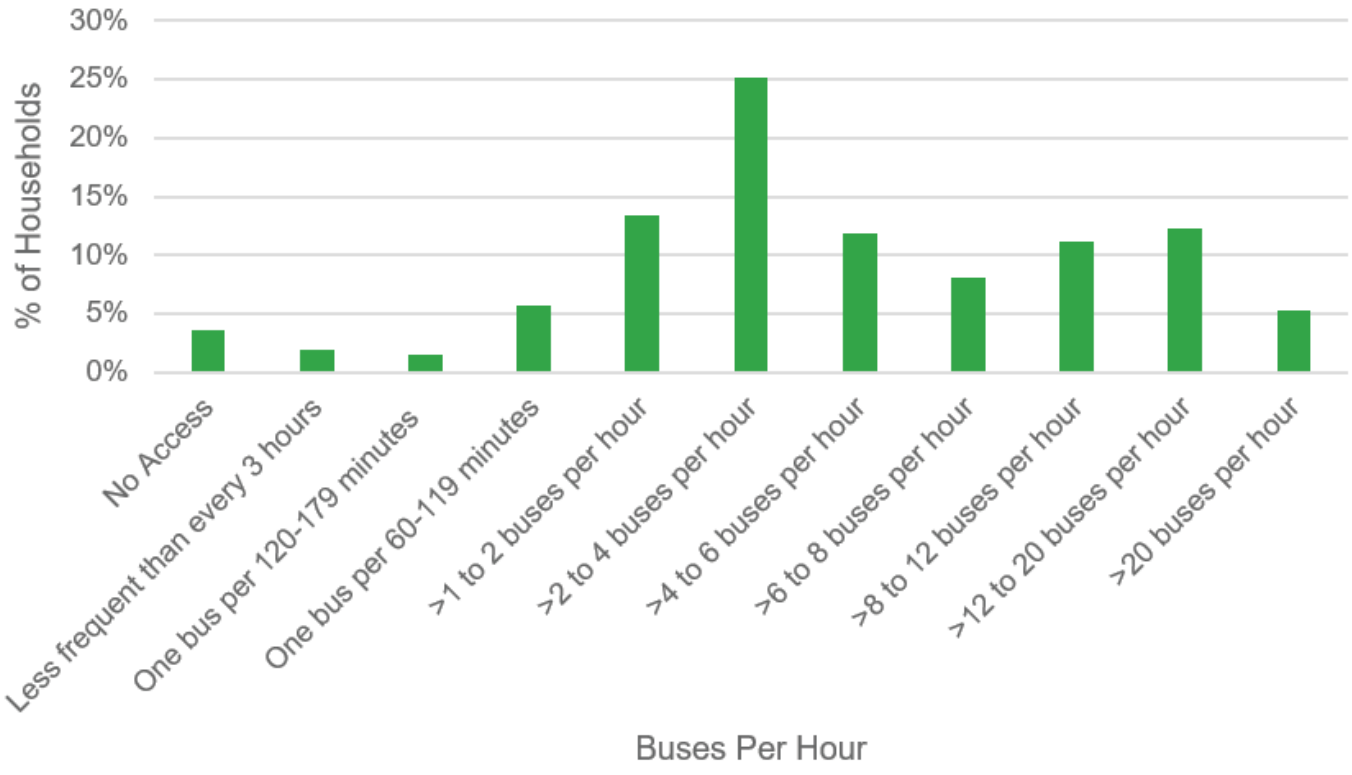


Figure 34: Percentage of households with defined bus frequencies (across all SEStran local authorities)

On this basis, around a quarter of SEStran residents see a service of 3-4 buses per hour, with around a quarter having no or an inferior service, and half having a better service. Of course, this varies widely across the region and the figure below shows a slightly aggregated set of frequency categories at the local authority level.

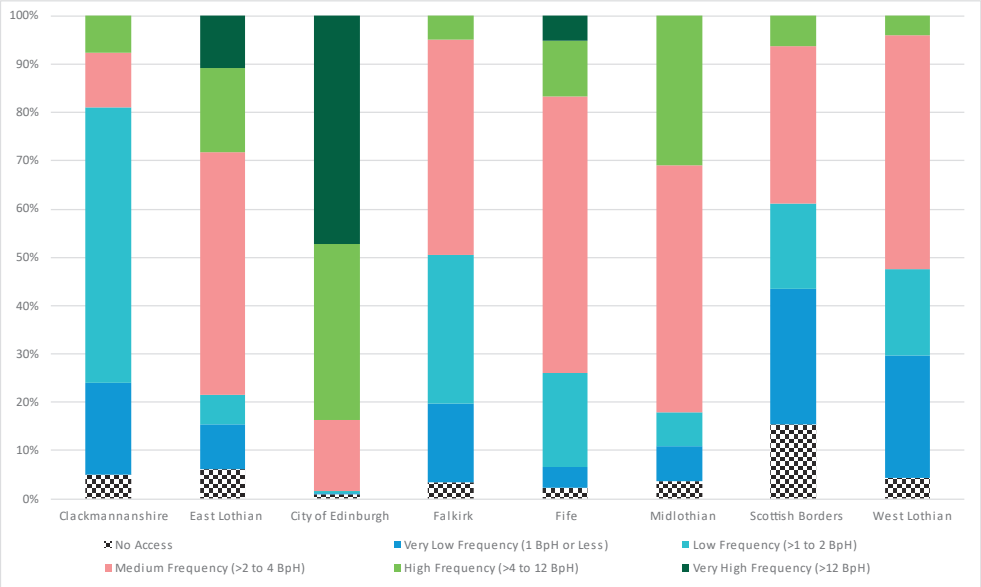


Figure 35: Percentage of households with defined bus frequencies, by SEStran local authority

Households in the City of Edinburgh authority area see the highest frequencies of bus service, with 84% of households having 'very high' or 'high' frequency services by this definition. Conversely, Scottish Borders and Clackmannanshire have the highest proportion of households with 'no access', 'very low frequency', or 'low frequency' bus services, at 76% and 61% respectively.

A service every 10-12 minutes is often regarded as 'turn-up-and-go', i.e. the user does not have to plan to be at the bus stop at a certain time to catch a bus. On this basis, 84% of Edinburgh households, 31% of Midlothian households (settlements closest to Edinburgh), 28% of East Lothian households (primarily Musselburgh), 17% of Fife households (parts of Dunfermline and Kirkcaldy), 7% of Clackmannanshire households, 6% of Scottish Borders households, 5% of Falkirk households and 4% of West Lothian households benefit from a 'turn-up-and-go' bus service, demonstrating a wide disparity across the region. It is perhaps surprising to see West Lothian with the worst services from this perspective given the more urban nature of that area compared to, say, the Scottish Borders authority area.

Figure 36 shows all bus stops in the region, colour coded based on their average frequency across the day ranging from dark green (most frequent) to dark red (least frequent). The map highlights the large number of services operating on some of the key corridors into Edinburgh with more than 20 buses every hour, equating to a bus approximately every 3 minutes and where bus congestion could be an issue. Conversely, outside of the larger towns, service frequencies reduce, and the more rural stops are served less often than one bus every 3 hours.

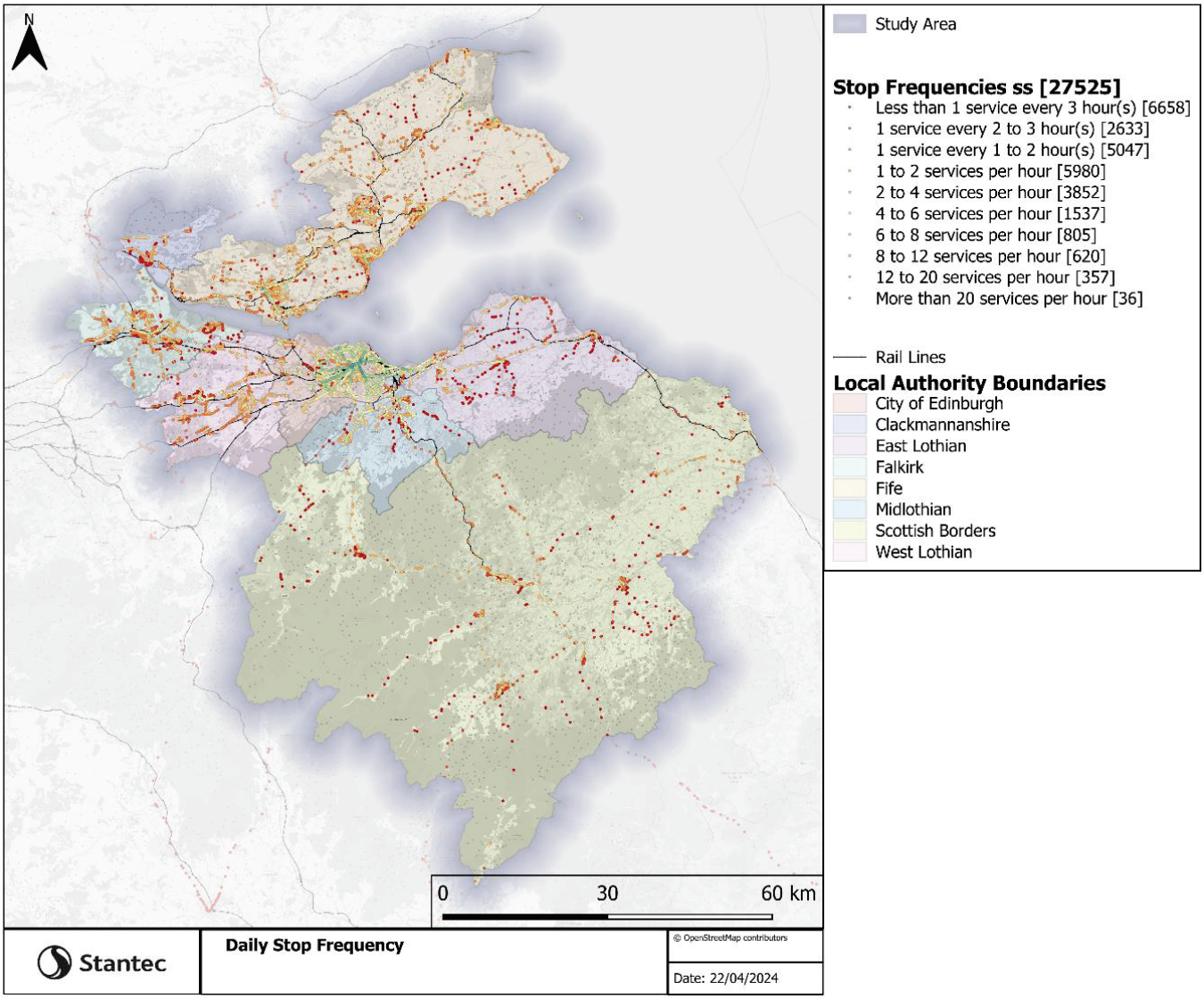


Figure 36: Daily stop frequency map across SEStran

It is clear that the stops which see the highest frequencies are typically the main arterial corridors into Edinburgh where city services and inter-urban services coincide and where there is often more than one operator. The level of service in the largest towns outwith Edinburgh does not typically match that seen in Edinburgh, even for those stops away from the main arterial corridors in Edinburgh.

Key Insight: The level of bus frequency provided to residents in the region varies widely. Of course, urban areas, especially in Edinburgh, tend to see more frequent services due to higher demand and population density but the level of service seen in Edinburgh is substantially higher than even the biggest other towns in the region. Low levels of frequency therefore is likely to be significant problem, making bus travel less attractive and suppressing bus passenger numbers in parts of the region.

Weekday Direct Access to Edinburgh and other cities

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

The ability to directly access (travel to a destination without any transfers or changes in the mode of transportation) Edinburgh city centre by public transport has therefore been considered through the bus network only (which is free to under 22s and those over the age of 60). The results are shown in Table 2 and Figure 37 (Edinburgh).

Whilst Edinburgh tends to dominate travel patterns in South East Scotland key destinations are not confined to the SEStran region, particularly for people in the west and north of the region, and therefore we also looked at other major urban centres nearby with the results shown in Figure 38 (Glasgow), Figure 39 (Stirling) and Figure 40 (Dundee).

Table 2: Percentage of households with convenient access to a bus stop and a direct connection to Edinburgh city centre by local authority

Local Authority	% no bus stop access	% households with convenient access to a bus stop and a direct connection to Edinburgh city centre….
Clackmannanshire	5%	0%
East Lothian	6%	90%
City of Edinburgh	1%	99%
Falkirk	3%	15%
Fife	2%	43%
Midlothian	4%	98%
Scottish Borders	15%	57%
West Lothian	4%	59%
Total	**4%**	**65%**
Total – outside Edinburgh	**5%**	**50%**

When considering the bus network only, the analysis shows that **50% of households (with bus access) outside of Edinburgh have no direct bus to Edinburgh.** Direct public transport connectivity varies considerably by local authority, with Clackmannanshire having no direct bus connection to Edinburgh at all. Many of the rural locations poorly served by bus are not within the catchment of the rail network and so rely on bus connectivity.

Those outwith access to direct connections are less likely to travel and may, therefore, be missing out on opportunities in Edinburgh. Alternatively, they may be experiencing a range of challenges in travelling to Edinburgh including long journey time, the need for interchange, reliance on the car (either to drive or for a lift) and potentially forced car ownership.

Some National Entitlement Card holders may also be forced to use rail, incurring a cost that other cardholders in the region with access to a direct bus will not.

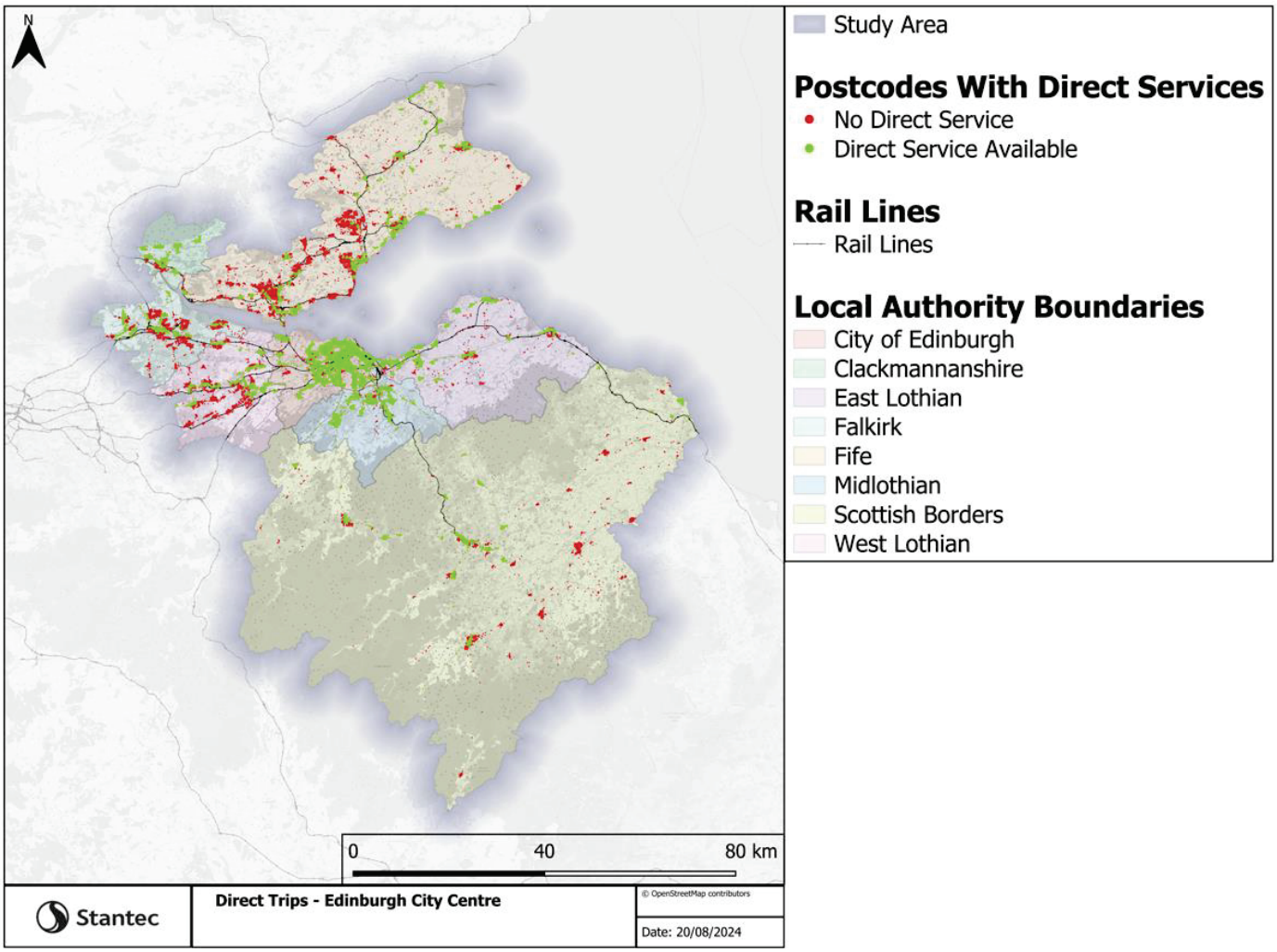


Figure 37: Direct trips to Edinburgh city Centre

City of Edinburgh – notably Ratho has no direct service, in addition to parts of Kirkliston

Clackmannanshire – no direct bus, or indeed rail connection to Edinburgh

East Lothian – whilst access is generally good, large parts of Haddington and Dunbar, south Musselburgh (near the railway station) and smaller localities such as Elphinstone, Gifford and East Saltoun have no direct access.

Fife – only some parts of the three largest settlements of Dunfermline, Kirkaldy and Glenrothes, the Forth bridgehead area and some coastal settlements have direct access, as do settlements served by longer distance and St Andrews services. In Fife, especially, some longer distance coach and bus services stop at edge of town P&R sites, where these are available, sometimes resulting in urban areas being missed by direct connections. Rail does provide direct connectivity from many Fife towns and villages not covered by bus around the Fife Circle and Ladybank.

Falkirk – direct access limited to parts of Grangemouth, Bo'ness and the A803 corridor into Falkirk. Rail provides an additional direct connection from Larbert.

Midlothian – very good access in general

Scottish Borders – no direct access from east of the A68 to the Berwickshire coast including the major central Borders / Berwickshire towns of St Boswells, Jedburgh, Kelso, Coldstream, Duns. Rail provides an additional direct connection from Tweedbank.

West Lothian – no direct access along the A71 / rail corridor west of Livingston (West Calder etc.) and indeed large parts of western Livingston itself and Uphall Station. Whilst the larger settlements are served in part by 'corridor' services, some such as Blackburn, Blackridge and Torphichen do not have direct connections. Rail provides an additional direct connection from Blackridge, Uphall Station, West Calder, Addiewell and Fauldhouse.

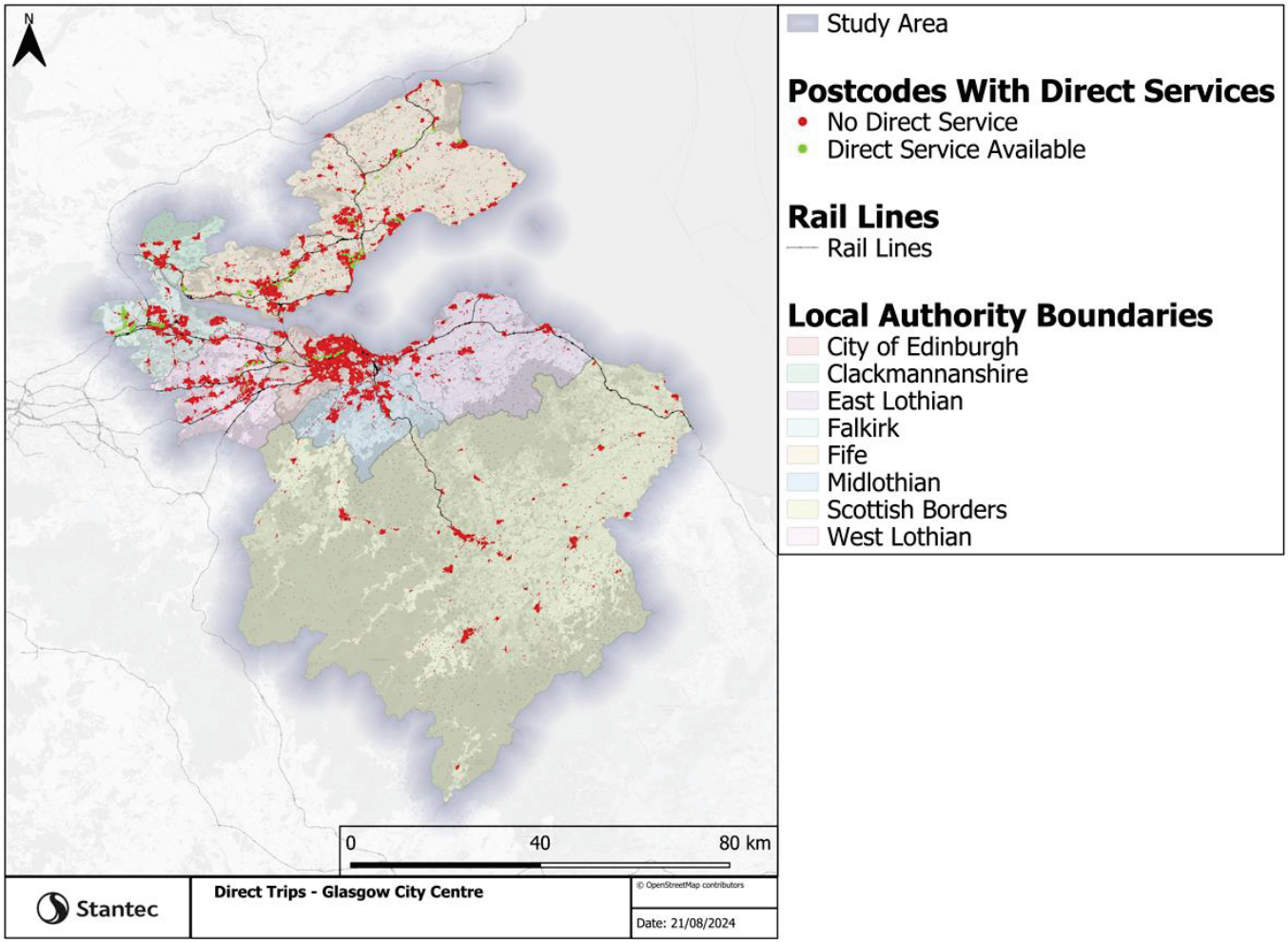


Figure 38: Direct trips to Glasgow city Centre

In comparison, direct access to Glasgow is highest in Falkirk and Fife with 23% of households (with bus access) in each authority having access. The rest of the council areas, other than Edinburgh, do not have any direct access to Glasgow City Centre. Direct access from Edinburgh is limited to the A8 corridor. Clackmannanshire therefore does not have direct bus connections to Edinburgh or Glasgow.

Only 7% of households with access to a bus stop in the SEStran region have direct access to services to Glasgow city centre.

Rail connectivity to Glasgow is much more widespread compared to bus – via the three Edinburgh-Glasgow lines in addition to Stirling and Alloa services.

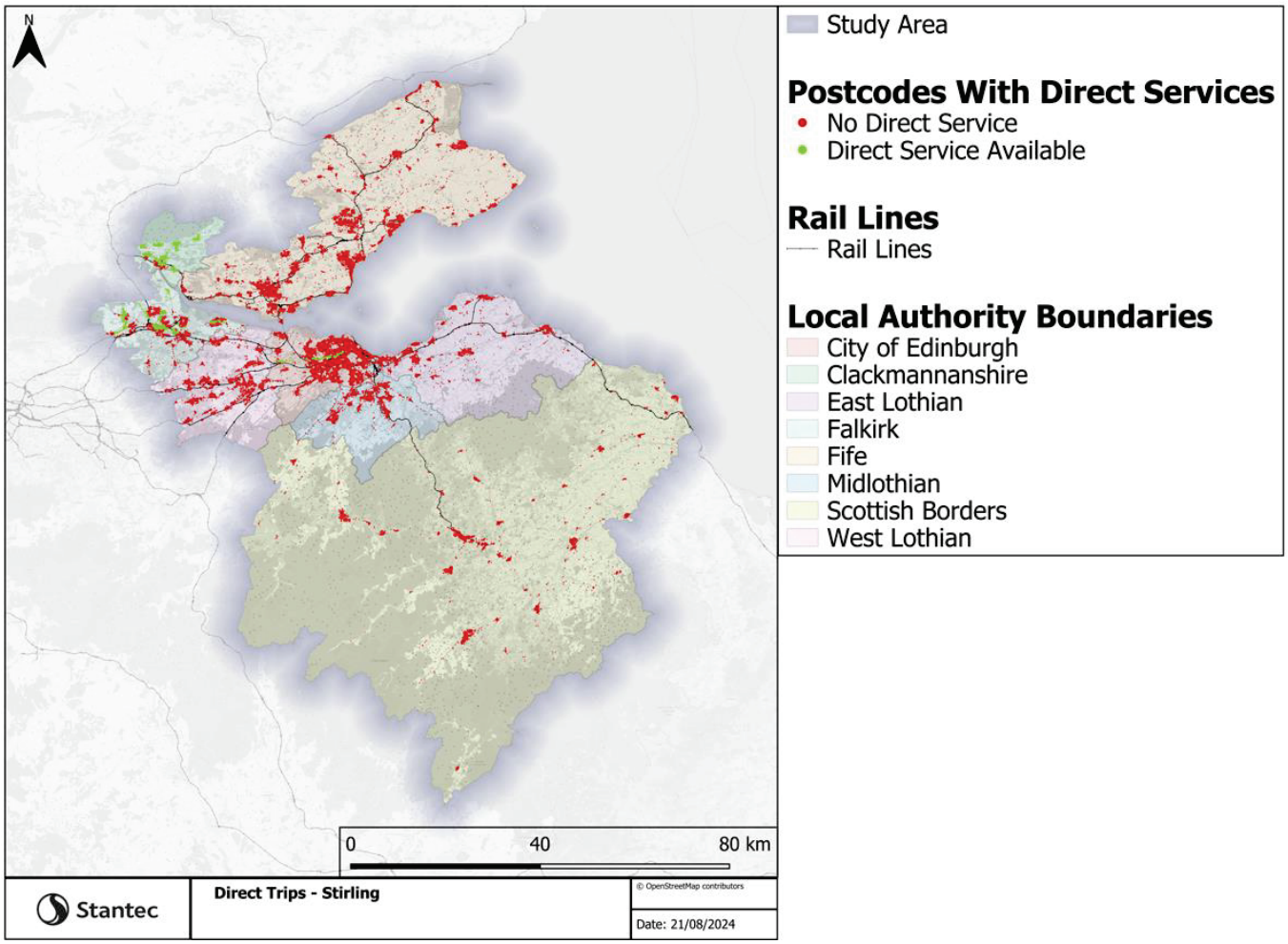


Figure 39: Direct trips to Stirling

Direct access to Stirling is also very poor within the SEStran region with only Clackmannanshire, Falkirk, and City of Edinburgh having access, with 89%, 36% and 5% of households (with access to the bus network) having direct access respectively.

Only 8% of households with access to a bus stop in the SEStran region have direct access to services to Stirling.

Given the proximity of Falkirk to Stirling, direct connectivity is actually rather limited, mainly to central Falkirk, Bo'ness and the Denny area (benefitting from services to Glasgow). This data emphasises the importance of Stirling to Clackmannanshire. It is perhaps notable that there is no direct connectivity from central and west Fife to Stirling along the north of the Forth.

Again, more direct access to Stirling is provided by rail from both Edinburgh and Glasgow to Stirling services.

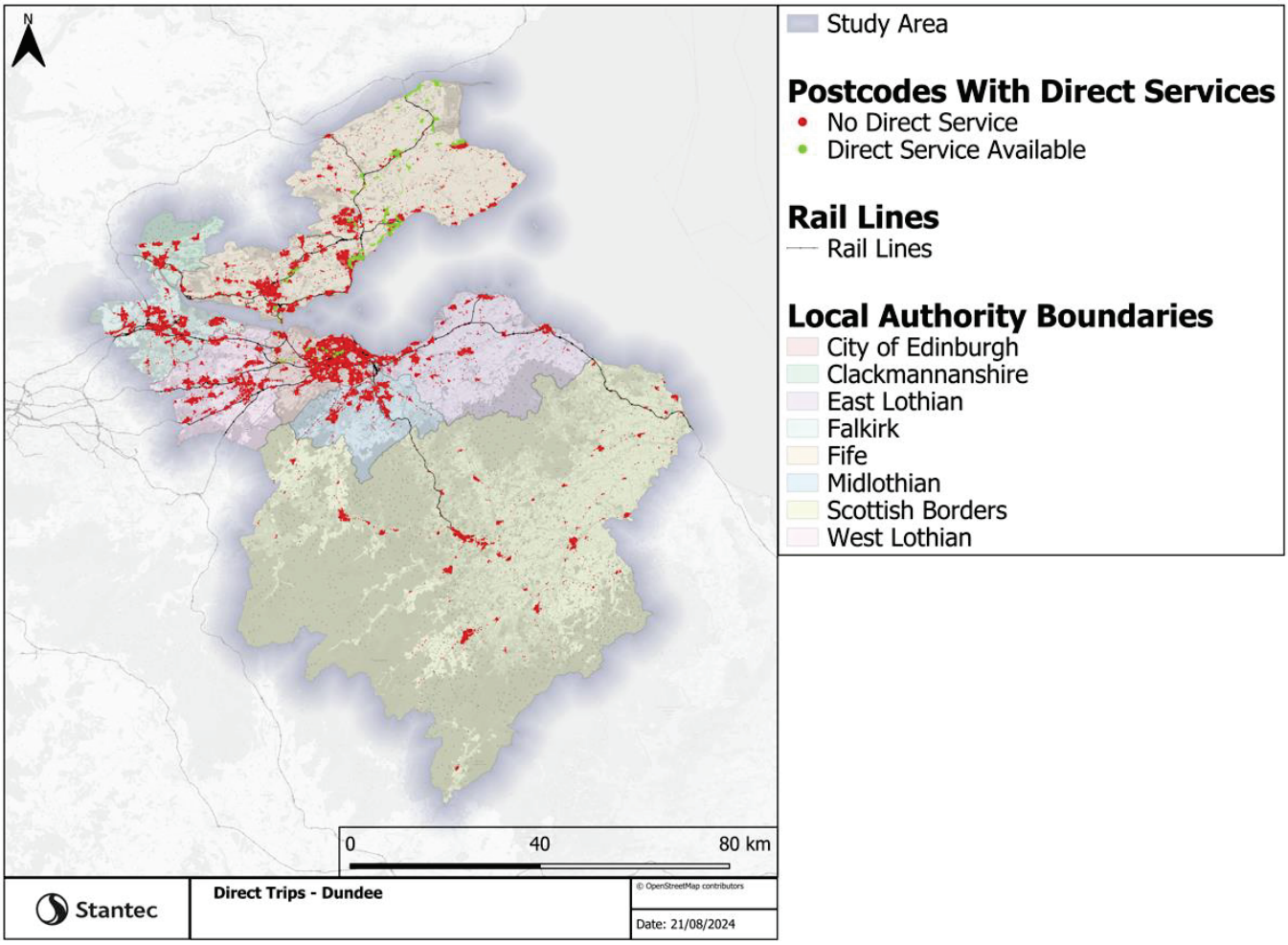


Figure 40: Direct trips to Dundee

Only the City of Edinburgh (7% of households) and Fife (30%) have direct access to Dundee. Whilst north Fife has generally good access, the East Neuk villages between Leven and St Andrews do not have direct access.

Only 9% of households with access to a bus stop in the SEStran region have direct access to services to Dundee.

Dundee is served by a range train services from Edinburgh, Glasgow and further afield.

Key Insight: Nearly half of all SEStran households outside of Edinburgh have no direct bus connection to Edinburgh city centre. Direct connections to Scotland's other neighbouring cities are much poorer, with only 7% of all SEStran residents benefitting from direct connections to Glasgow, 9% to Dundee and 8% to Stirling. Rail connectivity is more widespread for these cities, but this can disadvantage concessionary card holders as they will have to pay (or interchange) whilst those with a direct bus can travel for free.

The requirement to interchange to access these cities is likely to be a problem for some, suppressing bus passenger numbers for travel outwith the regions and from the other seven local authority areas to Edinburgh.

Weekday Evening Services

Services which do not operate into the evening can limit residents' employment and social and leisure opportunities in particular; they also undermine confidence in using daytime bus services given the risk of feeling stranded if return travel is later than anticipated (e.g., working late). This can lead to people not taking these opportunities, or instead having to use a car, rely on lifts, or use taxis which can be significantly more expensive.

Analysis considering access to bus services in the evening, considering when bus stops across the region are served by their last bus is shown in Table 3.

Table 3: Percentage households with no access to bus service after 19:00 and 22:00 (under defined walk catchments)

Local Authority	% no bus stop access	% households with bus stop access without a service after 19:00	% households with bus stop access without a service after 22:00
Clackmannanshire	5%	14%	20%
East Lothian	6%	12%	17%
City of Edinburgh	1%	1%	2%
Falkirk	3%	6%	35%
Fife	2%	4%	5%
Midlothian	4%	6%	12%
Scottish Borders	15%	48%	86%
West Lothian	4%	12%	44%
SEStran	**4%**	**8%**	**18%**

This suggests that in addition to the 4% without any access a further **8% of households have no service after 19:00**. This rises to as much as 48% without early evening access in the Scottish Borders and in general highlights the poor evening bus connectivity after 1900 across significant parts of the region.

The proportion of households with no access to bus services rises to **18%** across the region when looking at the period after 22:00 on a weekday, i.e., services which provide access to the evening economy. Scottish Borders again has the highest proportion of households (86%) without access to a bus service after 22:00, followed by West Lothian and Falkirk with 44%, and 35% respectively. These areas have proportions that are far higher than the City of Edinburgh (2%) and Fife (5%).

These tables for services after 19:00 and 22:00 show the lack of equality for households in the region in terms of access to weekday evening services. Those living in the Scottish Borders will be far less able to access services, employment, or leisure services later into evening, or will do so by car. Also, it results in higher levels of 'forced' car ownership for those regions which suffer from accessing evening services.

The figure below provides a visualisation of the time of the weekday last bus at the bus stop level across the region ranging from dark red (early) to late (dark blue).

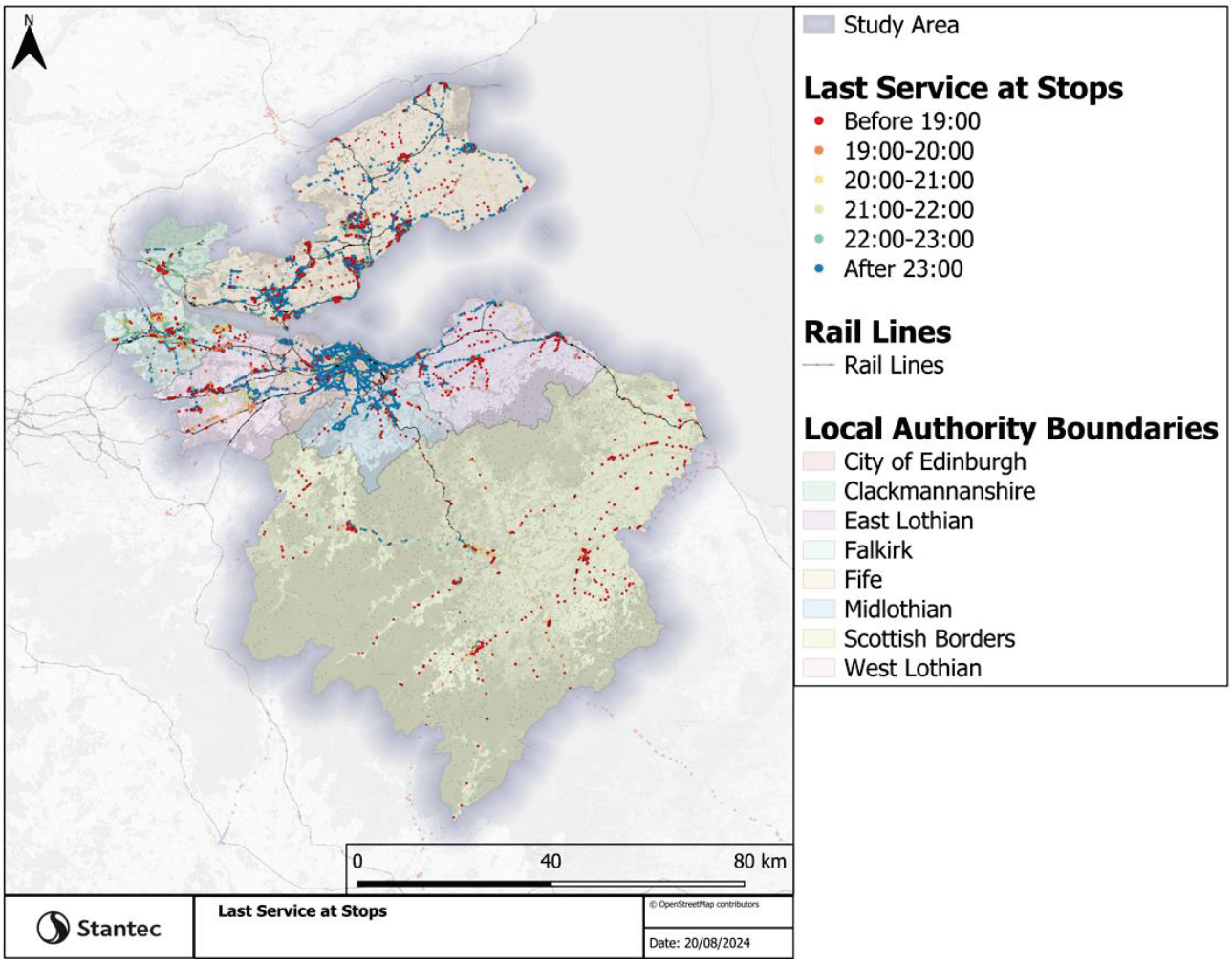


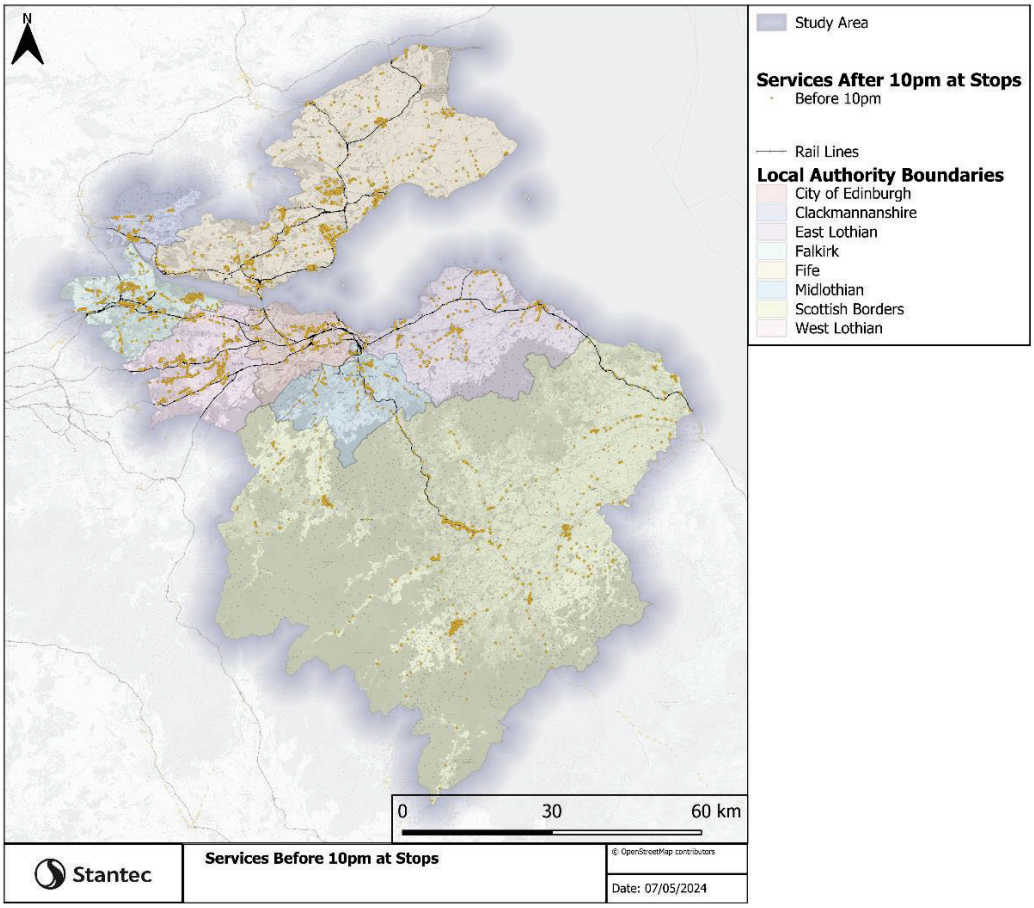
Figure 41: Weekday last service stops

The red dots show areas across rural parts of the SEStran area where services stop before 19:00, including large swathes of the Scottish Borders, including some bigger towns such as Coldstream and Duns. The early finish of many services in West Lothian, Falkirk and Clackmannanshire is also seen here.

Key Insight: In addition to the 4% of households without access to a bus stop, around 8% of households have no service after 7pm, rising to around 18% after 10pm. 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.

Communities that see their bus services stop in the evening cannot enjoy the full range of services provided in bigger neighbouring towns. This is likely to lead to forms of exclusion and increased car use.

To further illustrate the point, Figure 42 overleaf shows bus stops with services before and after 22:00, the second image showing how serices drop off sharly after 22:00 is many areas, especially Falkirk, West Lothian and Scottish Borders.



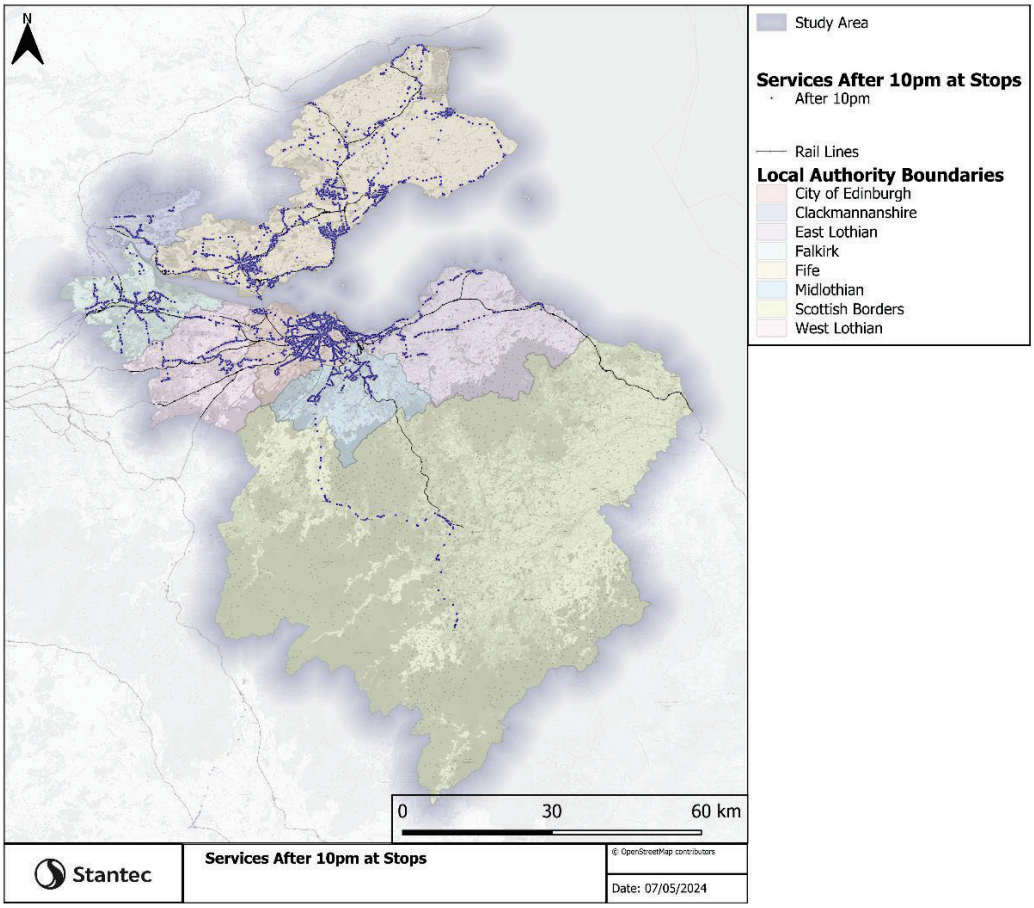


Figure 42: Weekday pre and post 2200 services

Sunday Services

Many public transport services operate a reduced level of service on a Sunday, and this is seen in the South East Scotland region bus network. This has historically reflected lower travel demand associated with fewer people working in particular. However, many jobs now require Sunday working now particularly in retail and hospitality. People now make more leisure trips on a Sunday too. Table 4shows the availability of Sunday services at the local authority level.

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

Local Authority	% no bus stop access	% households with no access to bus on a Sunday (under defined walk catchments)
Clackmannanshire	5%	27%
East Lothian	6%	13%
City of Edinburgh	1%	1%
Falkirk	3%	20%
Fife	2%	5%
Midlothian	4%	8%
Scottish Borders	15%	27%
West Lothian	4%	22%
SEStran	**4%**	**10%**

Analysis of Sunday bus services highlighted that, of those households with convenient access to a bus stop, 10% do not have a Sunday service. The absence of Sunday services is most prevalent in Clackmannanshire, where 27% of households with convenient access to a bus stop see no service on a Sunday.

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

Figure 43 overleaf provides a visualisation of where services do not operate on a Sunday. These are indicated by the green lines and are primarily found across rural part of the region.

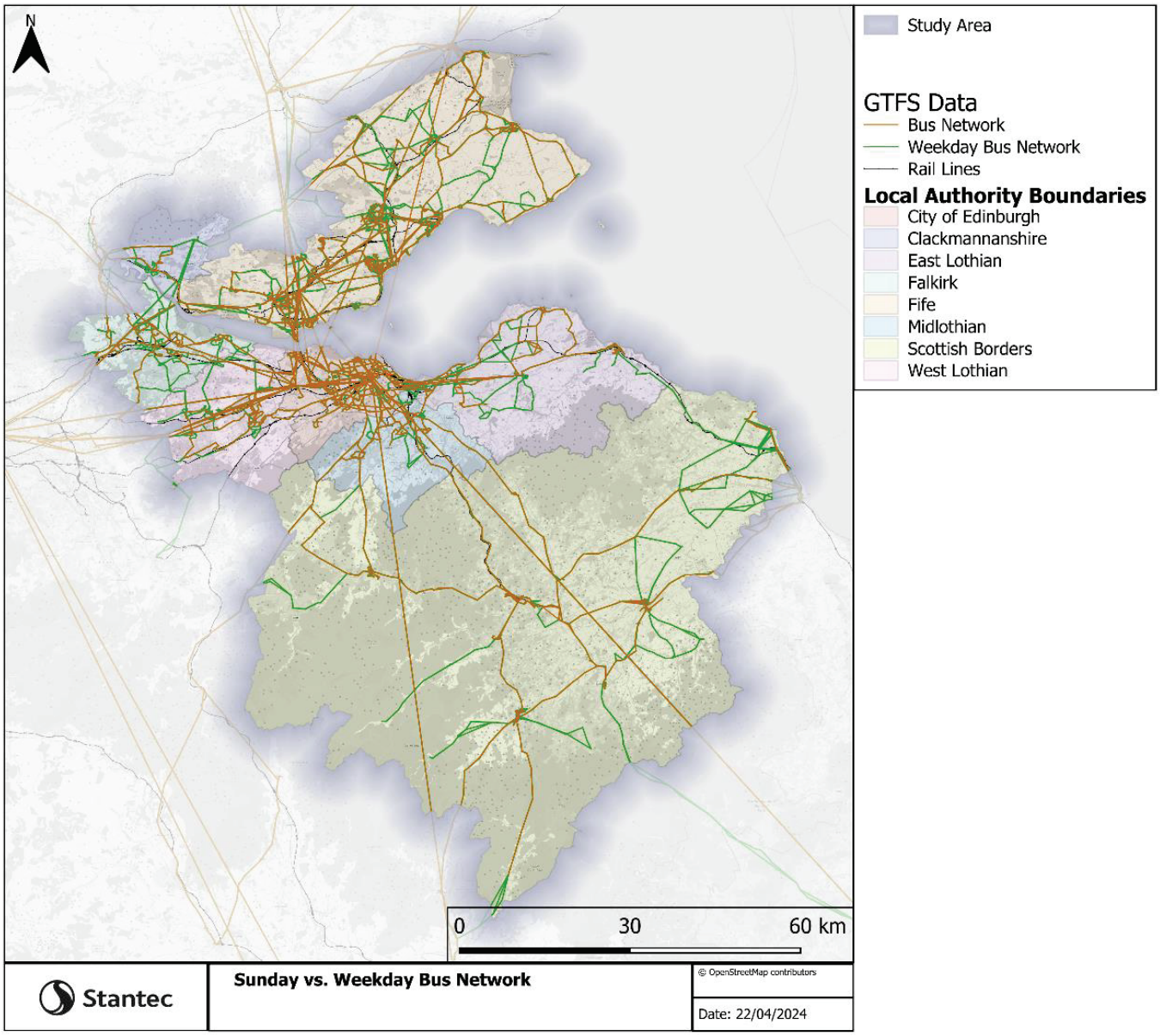


Figure 43: Bus network on a Sunday versus weekday network

Key Insight: Around 10% of households with access to a bus stop have no service on Sunday. Most households in Edinburgh, Fife and Midlothian have reasonable access to a bus service on a Sunday, however households in Clackmannanshire and Scottish Borders have more limited to access to Sunday bus services.

Most services will also see reduced frequencies, making bus travel on a Sunday less attractive and leading to higher car use.

Journey Time Comparison with the Car

Bus journey times can be a key problem which deter people from using the bus, especially relative to travel by car. Bus and car journey times between 20 towns across the region were analysed using Google API data (taking a central point in each town) to compare how long journeys between these locations would take for the bus and the private car in the AM (average of departures at 07:30, 08:00, 08:30), IP (average of departures at 11:30, 12:30, 13:30), and PM (average of departures at 17:00, 17:30, and 18:00) periods. This is presented as a ratio of car to bus journey times and is shown in Figure 44, Figure 45, and Figure 46 below. The green boxes highlight the 'best' ratios (i.e., where bus is most competitive), whilst the darker reds show where the ratios are highest and hence bus is less competitive.

		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		4.8	3.5	2.6	1.9	2.4	2.6	2.2	2.0	2.9	2.1	2.7	2.3	4.6	3.9	3.1	2.5	2.9	3.2	2.1	2.9
	Bathgate	3.7		3.1	3.7	2.9	1.6	2.0	2.1	2.2	2.7	2.0	2.8	2.7	1.4	3.2	2.4	2.4	2.9	3.2	2.0	2.6
	Dalkeith	3.3	3.1		3.4	2.4	1.7	3.0	1.5	2.1	3.4	1.6	2.5	2.2	3.1	2.5	1.8	2.4	2.1	2.1	1.9	2.4
	Denny	3.9	4.2	3.9		2.5	2.4	2.2	2.7	2.4	2.9	2.4	3.0	2.8	3.7	3.4	3.2	3.0	3.2	3.8	2.3	3.0
	Dunfermline	2.3	2.5	2.3	2.1		1.2	2.0	1.9	1.9	1.8	1.8	2.4	2.5	2.4	1.9	1.9	2.1	2.0	2.4	1.7	2.1
	Edinburgh	2.3	1.8	1.4	2.6	1.5		1.8	1.3	1.4	1.2	1.4	2.2	1.4	1.7	1.7	1.5	1.6	1.3	1.3	1.5	1.6
	Falkirk	2.5	2.6	3.1	1.9	1.9	1.7		2.2	2.3	2.2	2.0	2.6	2.6	1.7	2.2	2.4	2.5	2.5	3.1	2.0	2.3
	Galashiels	2.8	2.3	1.8	2.7	2.3	1.8	2.6		1.8	3.1	1.3	2.0	2.2	2.6	2.6	2.1	2.5	1.4	1.5	1.7	2.2
	Glenrothes	2.9	2.7	2.2	2.1	2.0	1.3	2.5	1.9		1.9	1.8	2.3	3.1	2.7	2.3	1.8	2.1	2.1	2.3	1.3	2.2
	Haddington	2.7	2.7	3.5	2.8	1.9	1.2	2.4	2.7	2.0		2.4	3.4	1.9	2.4	2.4	2.2	2.4	2.5	2.8	1.8	2.4
	Hawick	2.4	2.1	1.6	2.5	2.0	1.5	2.3	1.7	1.8	2.6		2.0	2.0	2.3	2.1	2.1	2.3	2.0	1.8	1.7	2.0
	Kelso	3.4	3.7	2.9	3.6	2.9	2.8	3.2	2.4	2.9	4.1	2.1		2.8	3.5	3.2	3.5	4.0	2.1	2.3	2.5	3.0
	Kirkcaldy	2.8	2.5	2.2	2.4	2.4	1.3	2.6	1.7	2.7	1.8	1.7	2.2		2.5	2.1	1.8	1.9	2.3	2.4	1.7	2.1
	Linlithgow	4.3	1.5	2.8	3.3	3.0	1.3	1.5	2.1	2.6	2.1	1.9	2.8	2.9		2.3	2.1	2.3	2.5	3.3	2.1	2.5
	Livingston	3.1	3.0	2.3	3.8	1.8	1.5	2.6	2.2	1.9	2.2	2.0	2.8	1.8	3.3		2.4	2.4	2.8	3.1	1.8	2.4
	Musselburgh	2.9	2.4	1.9	3.1	2.0	1.2	2.4	1.9	1.8	2.2	1.9	3.4	1.8	2.4	2.5		1.8	2.3	2.2	1.7	2.2
	North Berwick	2.7	2.7	2.6	2.6	1.9	1.5	2.4	2.4	2.1	2.8	2.3	3.2	2.0	2.4	2.5	1.8		2.6	2.6	1.9	2.4
	Peebles	3.0	3.0	2.4	3.0	2.3	1.4	2.7	1.6	2.3	2.6	1.9	2.1	2.2	2.8	2.7	2.3	2.4		1.3	2.0	2.3
	Penicuik	3.7	3.4	2.0	3.6	2.2	1.4	3.0	1.6	2.4	3.0	1.7	2.3	2.3	3.2	3.3	2.3	2.4	1.3		2.1	2.5
	St Andrews	2.9	2.3	2.2	2.1	1.6	1.6	2.0	1.9	1.5	1.9	1.9	2.2	1.7	2.3	2.1	1.9	2.0	2.0	2.2		2.0
	Averages	3.0	2.8	2.5	2.8	2.2	1.6	2.4	2.0	2.1	2.5	1.9	2.6	2.3	2.7	2.6	2.2	2.4	2.3	2.5	1.9	2.4

Figure 44: AM period bus to car journey time ratios

In the AM, journey times by bus are on average 2.4 times longer than by car, which is the lowest out of each of the time periods, although there are large variations between the origins and destinations. Bus is generally most competitive when travel involves Edinburgh with an average bus to car travel time ratio of 1.6. In contrast, bus journeys from Denny and Kelso and buses to Alloa take three times longer by bus than 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		4.3	3.9	2.7	1.9	2.3	2.3	2.4	2.0	3.0	2.3	2.9	2.4	4.2	3.3	3.2	2.7	3.0	3.7	2.0	2.9
	Bathgate	3.8		4.0	3.9	3.3	1.8	2.0	2.4	2.6	2.9	2.1	3.0	2.9	1.4	3.5	2.9	2.6	2.9	3.5	2.3	2.8
	Dalkeith	4.0	4.0		4.3	3.1	1.9	3.6	1.5	2.6	3.1	1.5	2.3	2.8	4.1	3.0	1.9	2.3	2.5	2.4	2.4	2.8
	Denny	4.3	4.6	4.4		2.6	2.6	2.3	3.0	2.4	3.3	2.5	3.3	2.9	3.6	3.7	3.6	3.2	3.4	4.2	2.2	3.3
	Dunfermline	2.5	2.4	2.7	2.1		1.3	2.0	2.1	1.5	2.0	2.0	2.4	2.4	2.3	1.8	2.2	2.4	2.2	2.6	1.6	2.1
	Edinburgh	2.4	1.7	1.4	2.5	1.5		1.8	1.3	1.4	1.2	1.4	1.9	1.4	1.7	1.7	1.4	1.7	1.3	1.5	1.5	1.6
	Falkirk	2.6	2.3	3.4	1.8	2.0	1.7		2.5	2.2	2.5	2.0	2.7	2.5	1.6	2.1	2.6	2.7	2.8	3.3	2.0	2.4
	Galashiels	2.8	2.4	1.7	2.8	2.4	1.9	2.7		2.1	2.4	1.3	1.9	2.4	2.8	2.8	2.1	2.4	1.4	1.5	2.0	2.2
	Glenrothes	2.9	2.8	2.6	2.1	2.1	1.4	2.7	2.2		2.1	2.0	2.5	3.1	2.7	2.3	2.0	2.2	2.2	2.5	1.3	2.3
	Haddington	3.0	3.0	3.3	3.1	2.2	1.3	2.6	2.6	2.3		2.5	3.4	2.1	2.7	2.7	2.5	1.8	2.6	3.3	2.0	2.6
	Hawick	2.5	2.1	1.6	2.4	2.0	1.5	2.2	1.7	1.9	2.3		2.9	2.1	2.2	2.1	2.0	2.3	2.0	1.8	1.8	2.1
	Kelso	3.3	3.1	2.6	3.2	3.0	2.6	3.1	2.3	2.7	3.7	2.8		2.8	3.2	3.2	3.0	3.6	2.1	2.2	2.5	2.9
	Kirkcaldy	2.8	2.7	2.5	2.3	2.3	1.4	2.6	1.9	2.6	2.0	1.7	2.4		2.6	2.2	2.0	2.0	2.3	2.3	1.6	2.2
	Linlithgow	4.5	1.5	3.8	3.7	2.8	1.5	1.4	2.5	2.8	2.5	2.0	2.8	2.6		2.3	2.8	2.7	2.9	3.5	2.2	2.7
	Livingston	3.2	2.7	2.9	3.8	1.8	1.6	2.5	2.5	2.0	2.7	2.2	2.7	1.8	3.2		2.7	2.7	2.8	3.6	1.8	2.6
	Musselburgh	3.1	2.9	1.9	3.3	2.4	1.3	2.6	2.3	2.1	2.1	2.1	2.6	2.0	2.8	2.9		1.7	2.5	2.5	2.0	2.4
	North Berwick	2.7	2.7	2.5	2.7	2.1	1.4	2.4	2.4	2.3	2.6	2.3	3.0	2.1	2.4	2.5	1.8		2.3	2.6	2.0	2.4
	Peebles	3.0	3.2	2.5	2.9	2.5	1.3	2.7	1.6	2.5	2.3	1.8	2.1	2.4	2.8	2.8	2.4	2.4		1.2	2.1	2.3
	Penicuik	3.4	3.9	2.1	3.5	2.6	1.3	3.1	1.6	2.7	3.1	1.7	2.4	2.5	3.5	3.7	2.4	2.5	1.3		2.2	2.6
	St Andrews	2.4	2.3	2.3	2.0	1.6	1.6	1.9	2.0	1.4	1.9	1.9	2.3	1.6	2.2	2.1	1.9	1.9	2.0	2.2		2.0
	Averages	3.1	2.9	2.7	2.9	2.3	1.7	2.5	2.1	2.2	2.5	2.0	2.6	2.4	2.7	2.7	2.4	2.4	2.3	2.7	2.0	2.5

Figure 45: IP period bus to car journey time ratios

In the IP period, the bus journey times relative to car gets slightly worse with it on average taking **2.5** times longer by public transport. Denny, Alloa, Bathgate and Dalkeith have the slowest bus service comparatively to cars out of all 20 towns. Again, Edinburgh has the lowest ratio between bus and car as both an origin and destination of 1.6 and 1.7 respectively.

		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

Figure 46: PM period bus to car journey time ratios

In the PM period the journey times of the bus compared to the car gets significantly worse with it taking **three times** longer on public transport. This gets particularly worse when travelling to Dalkeith, Hawick, and Kelso where it takes over four time as long in the bus than it would taking the bus.

In a separate piece of analysis, we have also produced maps, Figure 47 to Figure 57, to demonstrate graphically the difference between bus and car travel times in the AM peak period from all individual data zones to a range of locations across the region: Alloa, Dalkeith, Dunfermline, Edinburgh city centre, Leith, Edinburgh Park, ERI, Falkirk, Galashiels, Haddington and Livingston.

Bus journey times were calculated using 'Conveyal'-based routines using a 25th percentile journey time, implying that people know which bus they are going for rather than arriving a random as you would do for a turn-up-and-go service. More than one bus can be used. Car journey times are taken from Google API data. Datazones centroids shown in grey do not have access to the given destination within a two-hour time window by bus.

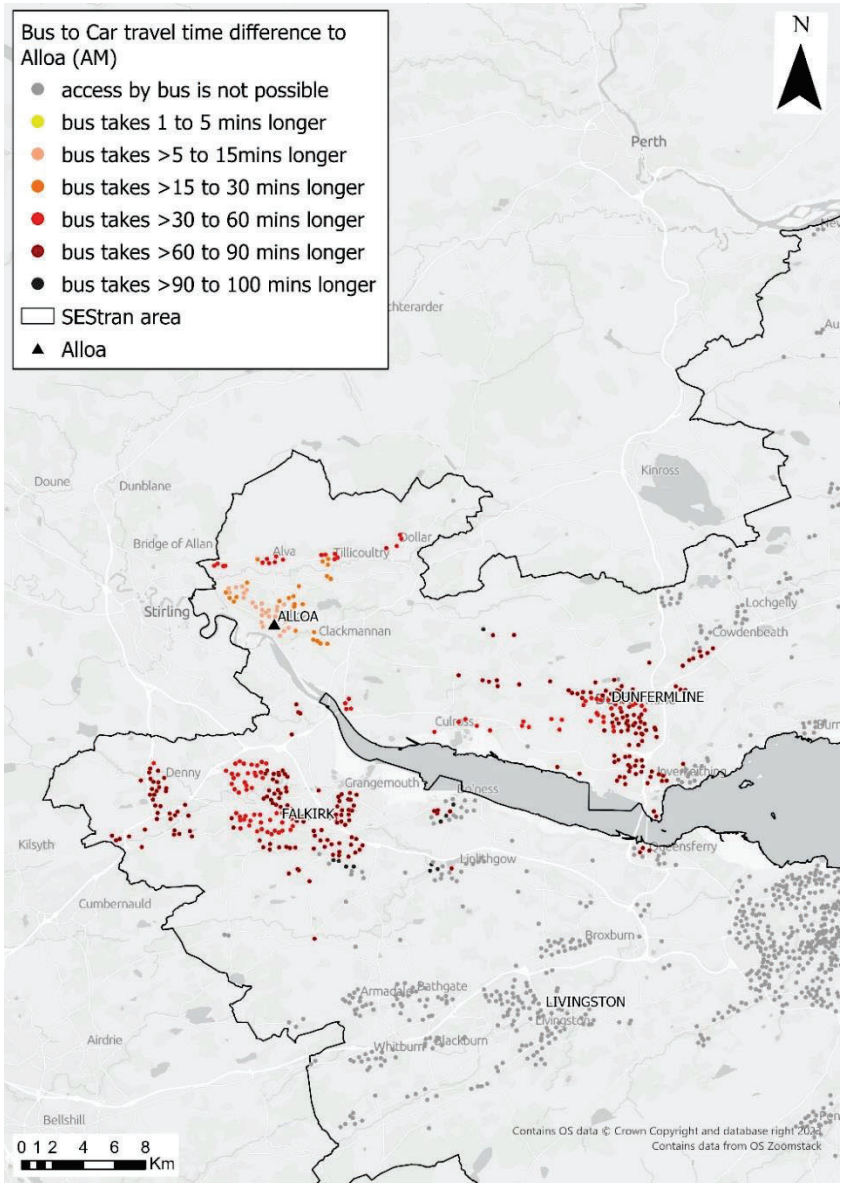


Figure 47: Bus to Car travel time difference to Alloa (AM peak)

Travel from much of Falkirk, Dunfermline and Denny takes 60-90 minutes longer by bus than by car.

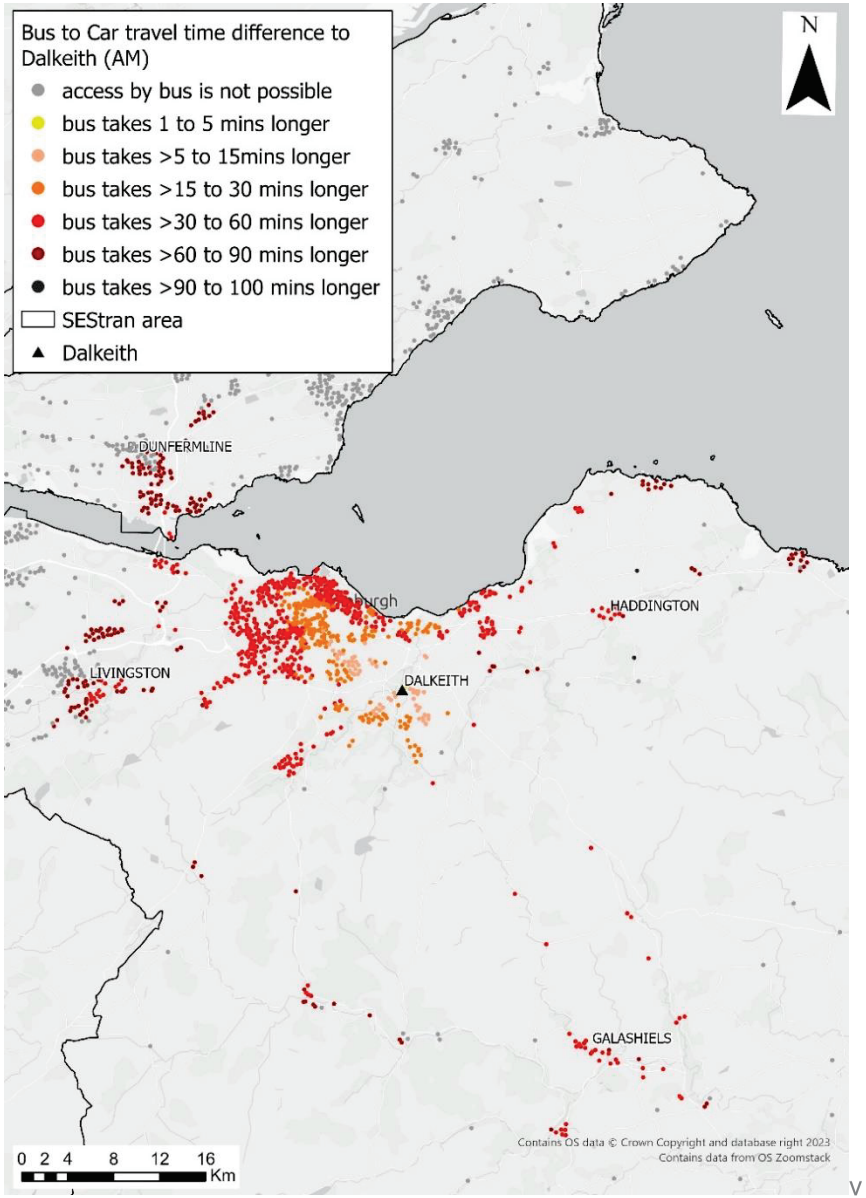


Figure 48: Bus to Car travel time difference to Dalkeith (AM peak)

Travel to Dalkeith takes 30-60 minutes longer by bus than car from much of west, north and east Edinburgh.

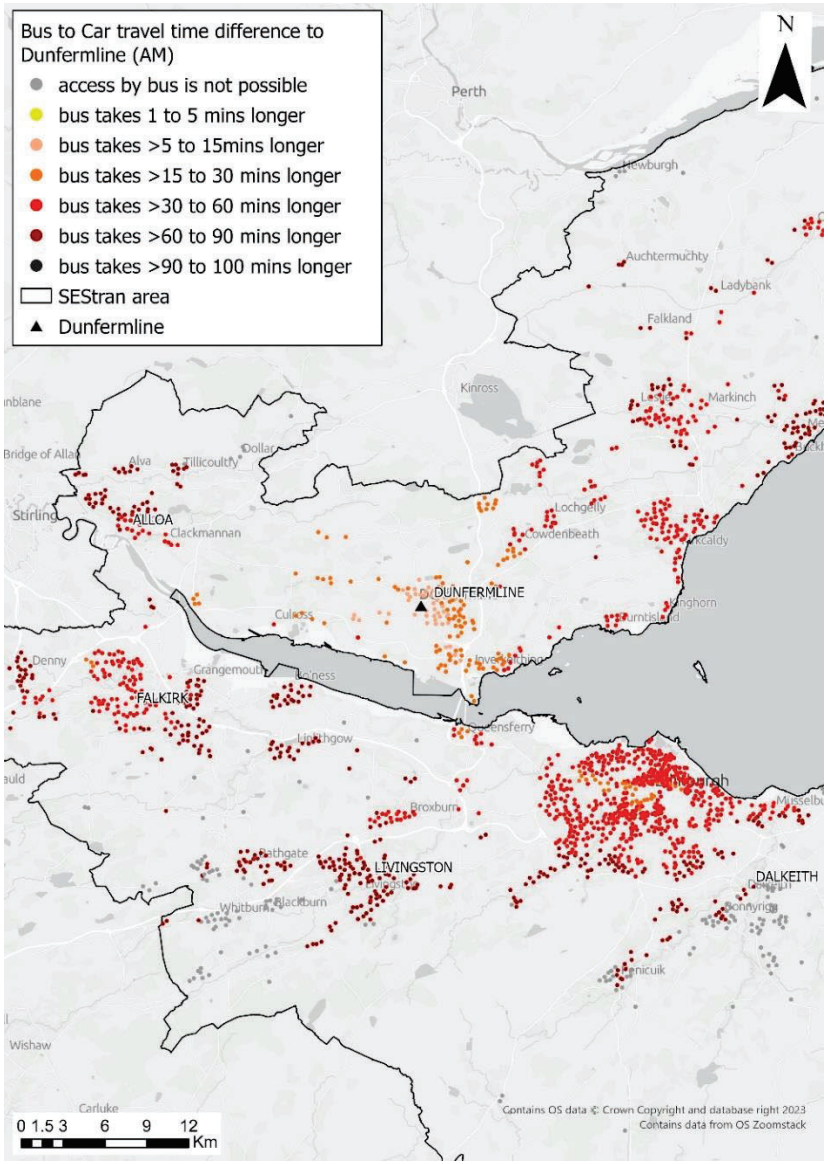


Figure 49: Bus to Car travel time difference to Dunfermline (AM peak)

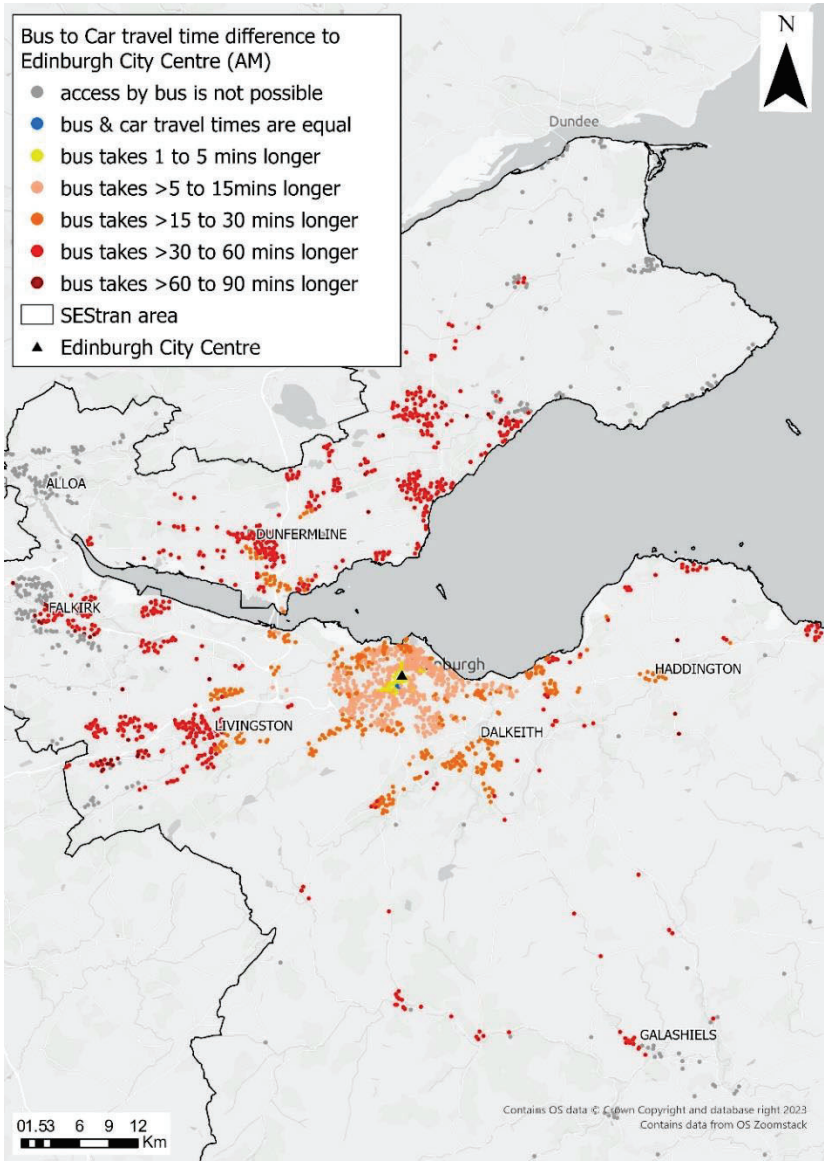


Figure 50: Bus to Car travel time difference to Edinburgh (AM peak)

175 Even across much of Fife, travel times by bus to Dunfermline are more than 30 minutes longer than by car. East Lothian and the Scottish Borders cannot reach Dunfermline in two hours by bus.

Within Edinburgh, bus travel times to the city centre are between five and 30 minutes longer than by car. This also applies to much of Midlothian and East Lothian. Most of the region can access the city centre in two hours by bus.

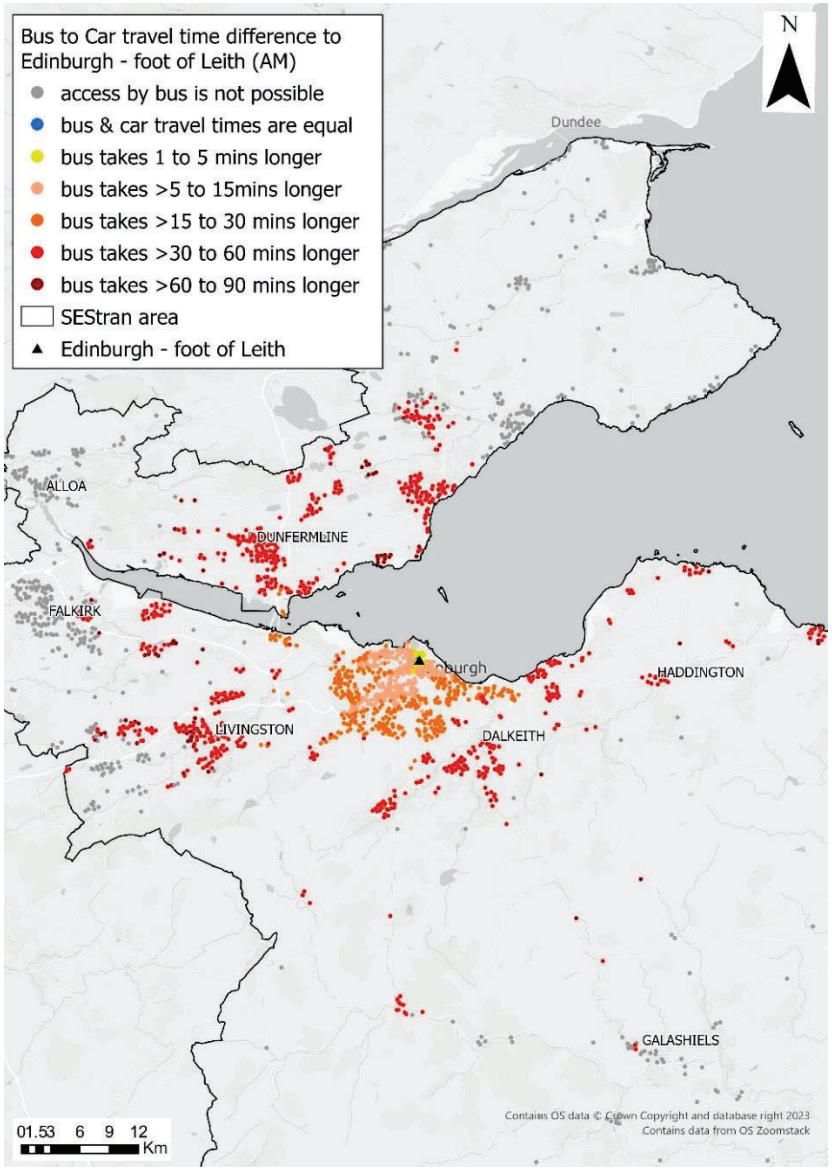


Figure 51: Bus to Car travel time difference to Leith (AM peak)

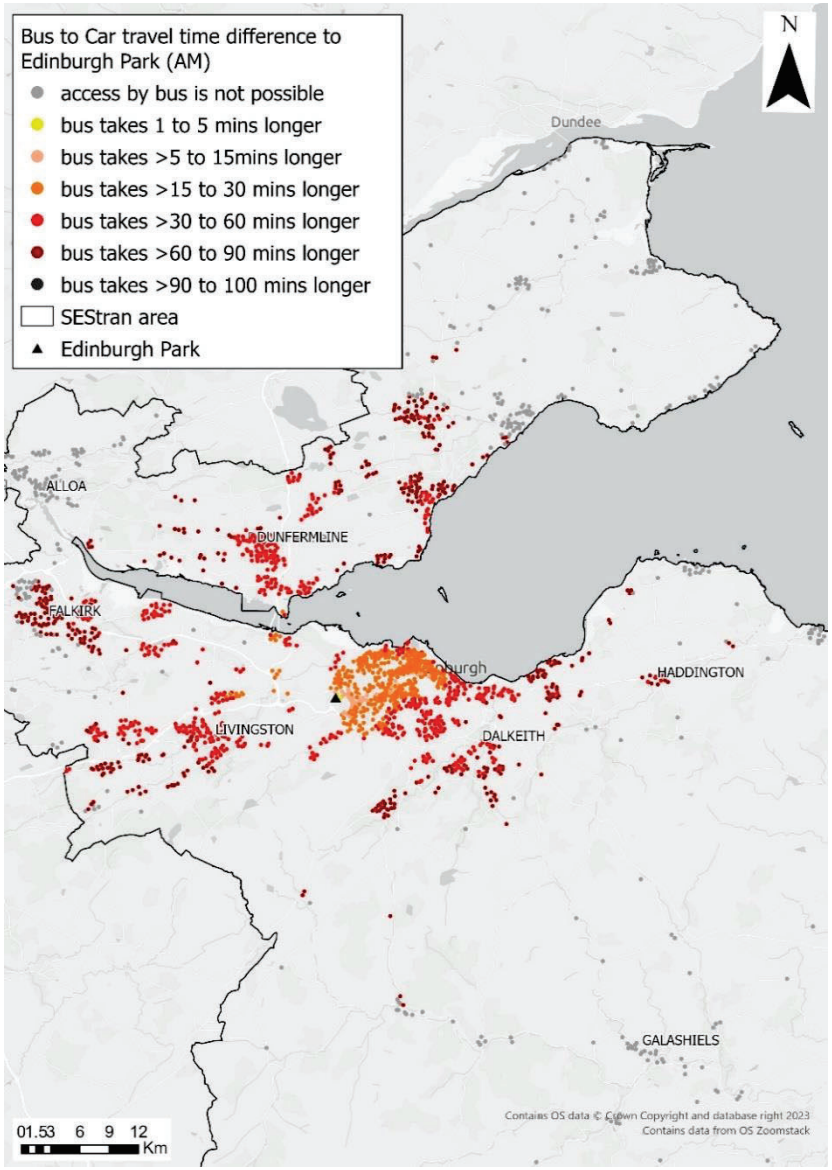


Figure 52: Bus to Car travel time difference to Edinburgh Park (AM peak)

176 Within Edinburgh, bus travel times to Leith are between five and 30 minutes longer than by car. Beyond the city this extends to more than 30 minutes. The requirement to travel to Leith narrows the two-hour catchment relative to the city centre.

Within Edinburgh, bus travel times to Edinburgh Park are generally between 15 and 60 minutes longer than by car. Beyond the city this extends to more than 60 minutes. For parts of Midlothian, travel times by bus are 60-90 minutes longer than by car.

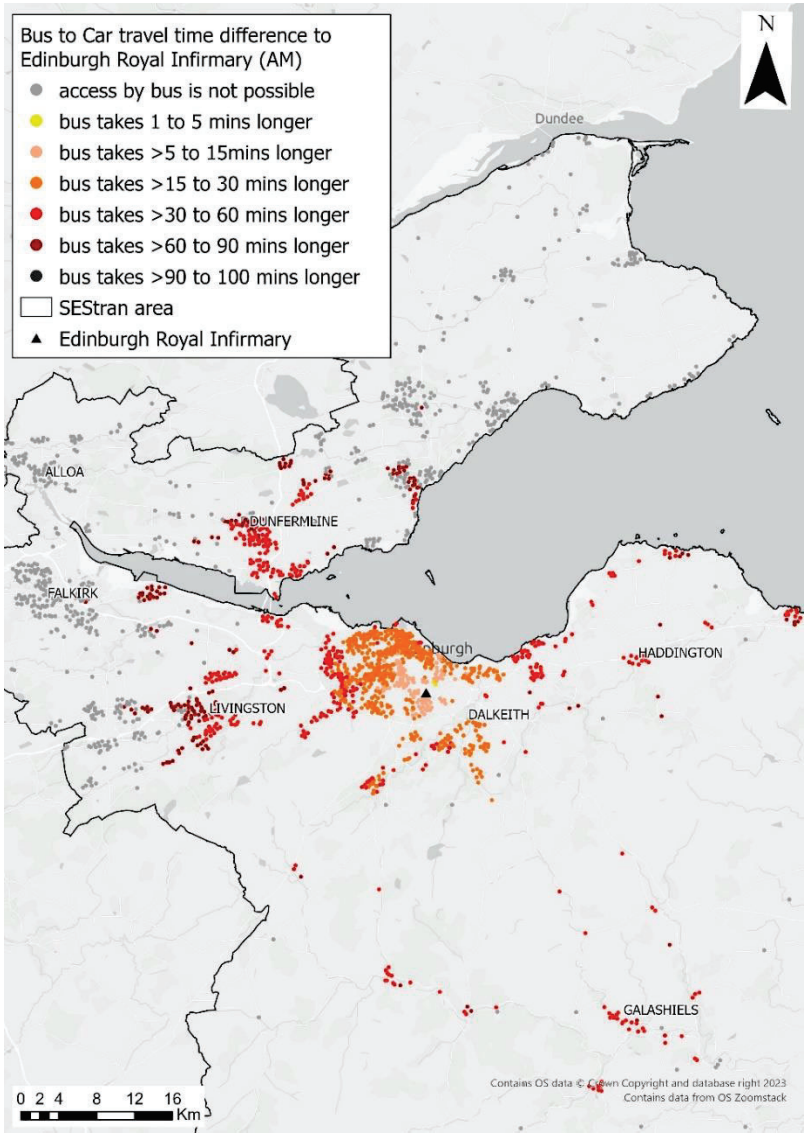


Figure 53: Bus to Car travel time difference to Edinburgh Royal Infirmary (AM peak)

Within Edinburgh, bus travel times to the ERI are generally between 15 and 60 minutes longer than by car. Midlothian has relatively good access. North Fife, Clackmannanshire and Falkirk cannot reach the ERI in two hours.

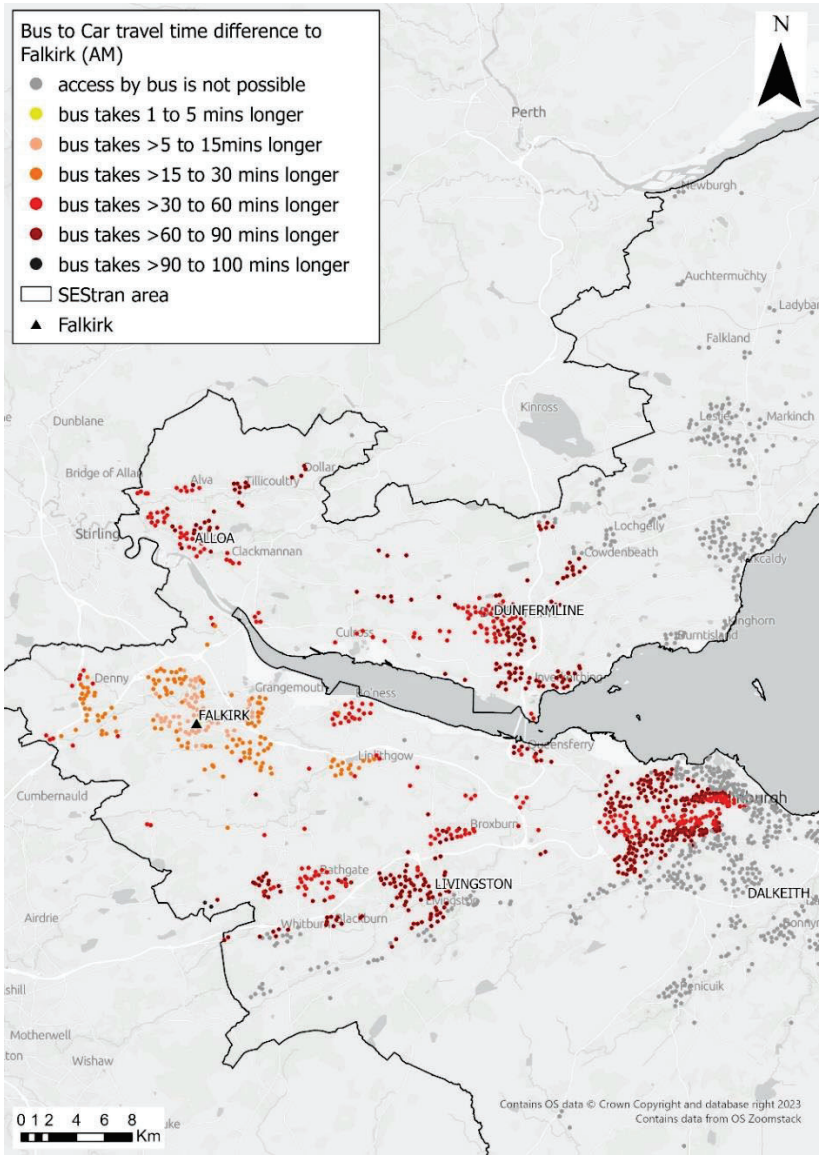


Figure 54: Bus to Car travel time difference to Falkirk (AM peak)

Given their proximity, there is a big difference in bus and car travel times between West Lothian and Falkirk. Much of Fife and Mid/East Lothian cannot reach Falkirk in the two hours.

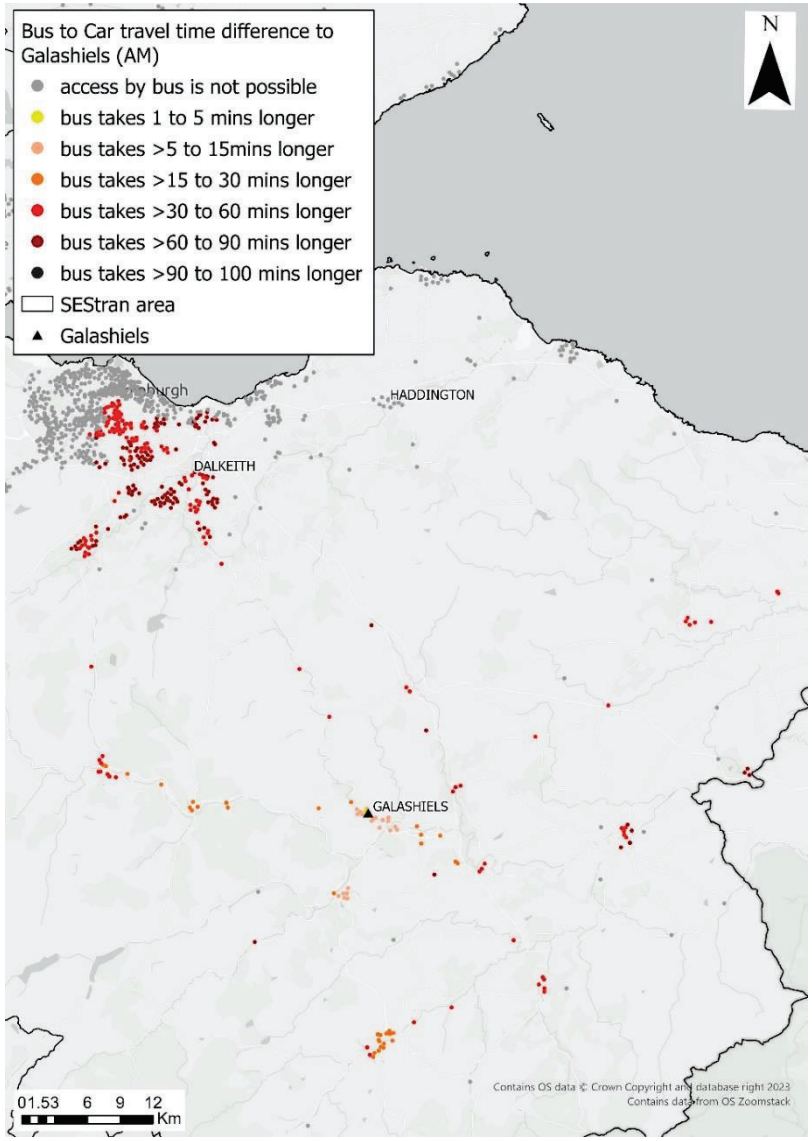


Figure 55: Bus to Car travel time difference to Galashiels (AM peak)

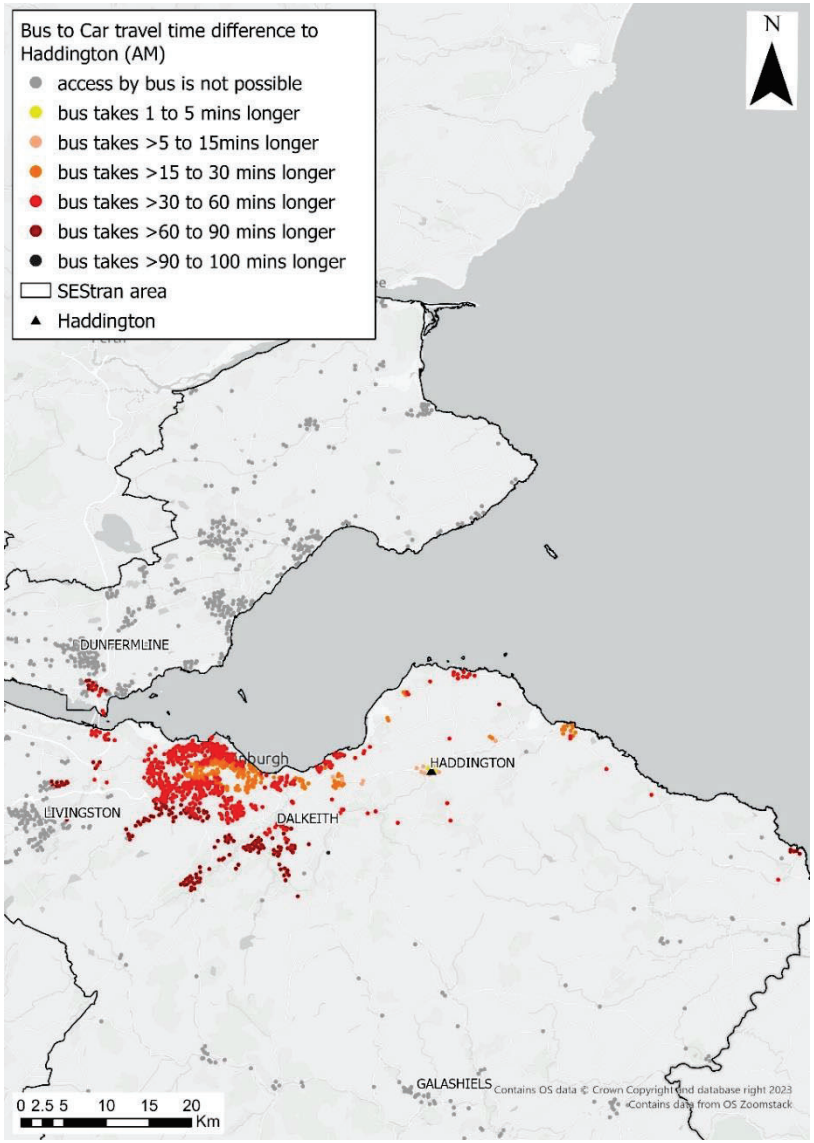


Figure 56: Bus to Car travel time difference to Haddington (AM peak)

178 Relatively few parts of the region can reach Galashiels in two hours by bus. Journey times from south east Edinburgh and Midlothian are 30-90 minutes longer by bus but the train would be somewhat quicker.

Even from most other East Lothian towns, travel times by bus are up to 60 minutes longer than by car. Very limited two-hour access by bus from west of Edinburgh and the Scottish Borders.

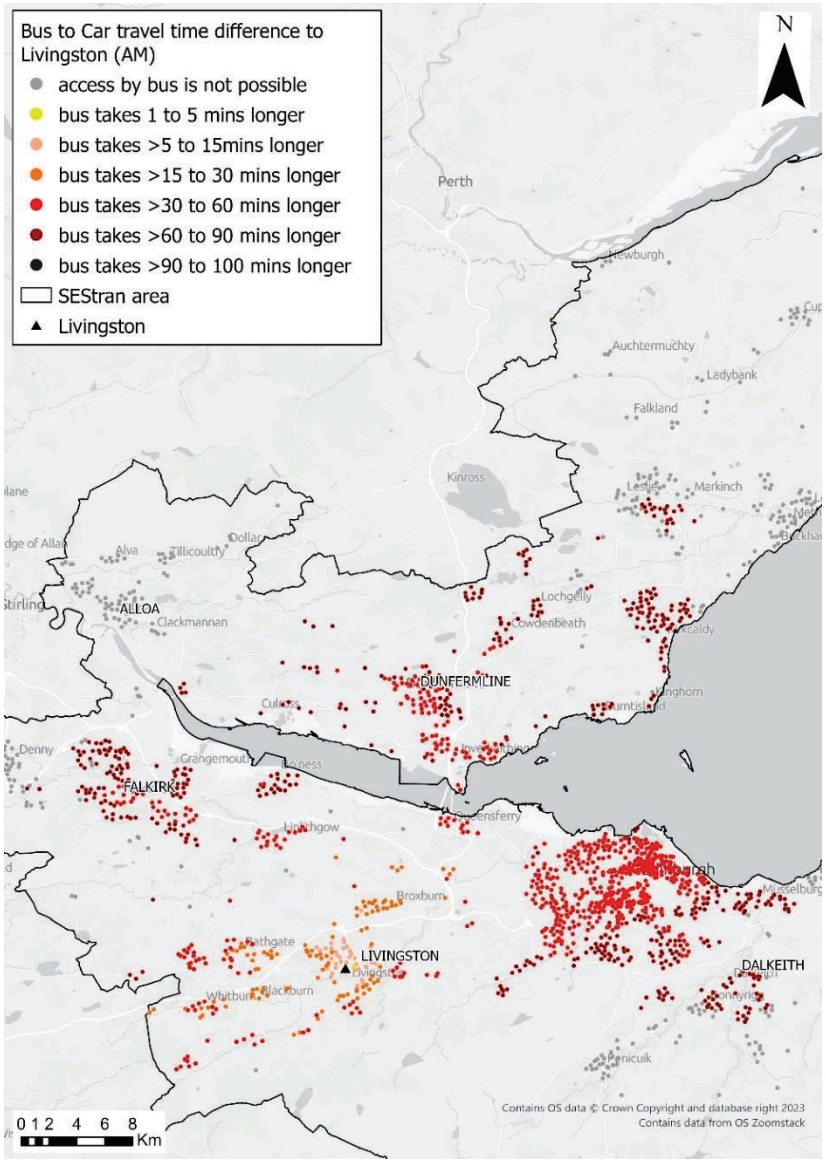


Figure 57: Bus to Car travel time difference to Livingston (AM peak)

179 Bus travel times from most of Edinburgh to Livingston are 30-90 minutes longer than by car, with even bigger differentials from most of Falkirk. There is no access with two hours from most of Midlothian and points east and south of there.

The RTS identifies the transport challenges in the SEStran region which will impact how people choose to travel. Journeys by bus can be far longer than the equivalent journey by private car. Further analysis found that the main settlements can require up to three interchanges, and some take over two-hours to travel between. Therefore, journey times and interchanges are significant barriers for people to use public transport. This exacerbates the current issues in the SEStran region with many areas being affected by deprivation and poor public transport connectivity to key services such as healthcare, employment, and education..

Key Insight: The trend of rising car use and the declining bus passenger numbers can partly be explained by the journey times often being far long on the bus for every period throughout the day. The longer bus journey time, often combined with the need to interchange, compared to other modes is a significant deterrent to bus use for those with access to a car and easy parking options. It will also impact those the most who do not have access to a car or train service, which is likely to include the most deprived communities within the region, and therefore further impact their ability to access employment and leisure opportunities.

Delay and its impacts

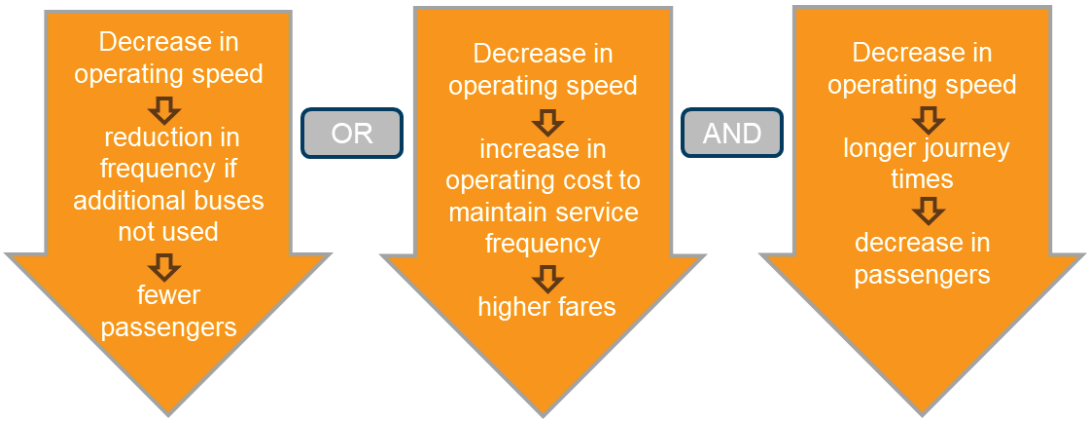
Delay across the road network has serious consequences for bus operators and their services, and these impacts are magnified where there are no bus priority measures. Congestion and the associated delay experienced by buses impacts on operational speed and therefore journey times and journey time variability (adherence to timetable), as well as increasing operating costs - all ultimately leading to fewer passengers and increased fares.

Congestion is a serious problem facing bus operators in the region and a particular issue for those operating in and around Edinburgh. Whilst private vehicles can use real time data apps to seek out alternative routes to avoid congested areas, bus operators have no such choice.

As congestion (and journey times) increases, operators can either:

- reduce service frequency to maintain operational costs, likely resulting in fewer passengers and risking a cycle of decline – long data (2004/05 to 2019/20) does confirm that passenger numbers and bus kilometres in the SEStran region are broadly correlated, or
- try to maintain service frequency by operating additional services with increased operational costs (additional vehicles, drivers, fuel, tyre and overall maintenance costs) likely leading to higher passenger fares – at the Scotland level, between 2004 and 2022 bus operating costs have gone up by 42% whilst fares have risen by 22%, as reported in Scottish Transport Statistics

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



Elasticity of demand suggests that:

- The elasticity of bus demand to vehicle kilometres is approximately -0.4 in the short-run and -0.7 in the long run[31] (i.e., a 10% decrease in bus kilometres operated leads to a 7% fall in patronage in the long run)
- The elasticity of bus demand to in-vehicle time for urban buses has been estimated to be roughly in the range of -0.4 to -0.6[31] (i.e. a 10% increase in journey time leads to up to a 6% fall in patronage in the long run)
- Bus fare elasticities average -0.4 in the short-run to -1.0 in the long run[31] (i.e. a 10% rise in fares will lead to a 10% fall in patronage in the long run), noting that responsiveness of demand to fare changes is less sensitive in the peak.

Analysis of bus journey times across the region to support development of the RTS highlights that they can be far longer than the equivalent car journey time at peak periods, whilst road journey times show there is a high degree of variability between peak and off-peak periods. This affects the attractiveness of bus services, particularly longer bus trips. During development of the RTS, Lothian Buses highlighted that their problems include congestion, road space allocation and service reliability, whilst congestion was also acknowledged as a key factor affecting buses by City of Edinburgh Council, Falkirk Council and Fife Council which impacts on the viability of smaller bus operators in particular.

It also impacts on the efficiency and attractiveness of rural services which access the city centre, when compared to cars. Rural operators highlight that rising costs of operating services on high milage routes between rural

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

conurbations, continued uncertainty in farebox revenue following COVID-19 and the increasing reliance on public funding to remain in operation. The challenge faced is to speed up journey times to encourage people to use public transport and also to make journeys more integrated and with seamless connections across all public transport modes including better multimodal ticketing between all operators.

The downward spiral of bus decline that congestion can cause is well articulated in NTS2 (see Figure 58), where increased congestion ultimately makes the bus network less attractive leading to fewer passengers, increased fares and more cars on the network, further increasing congestion…and so the decline continues. It is clear that reducing congestion, or enabling buses to be prioritised and protected from the worst congestion on the network would help reverse the downward spiral trend.

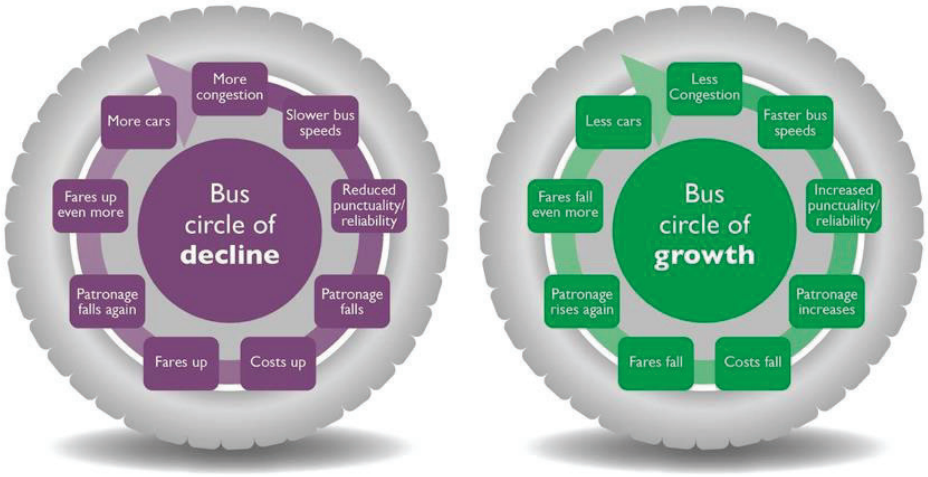


Figure 58: The bus circles of decline and growth

Key Insight: 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 general, which affects the price and attractiveness of bus services, particularly on longer bus trips.

Bus Punctuality / Journey Time Reliability

Information on the punctuality of buses and their journey time reliability has been taken from the Bus Partnership Fund (BPF) applications by Midlothian Council and the Forth Valley.

Midlothian BPF

The Midlothian Orbital Bus STAG[32] analysed delays for both Lothian Buses and Borders Buses using Automatic Vehicles Location (AVL) data provided by Lothian Buses for a one-week period in November 2019 and March 2022, with Borders Buses providing the same data in August 2019 and August 2022. This is especially useful to see if the conditions have changed since the pandemic.

For Lothian Buses, the areas where delays are occurring remained consistent both pre and post pandemic, and the magnitude of delays also remained broadly similar, although there was less delay in 2022 on the A7 north of Sheriffhall roundabout, at Hillhead on approach to A768 in Lasswade and on the A6094 at Eskbank Toll. Between Eskbank Road Roundabout and Gilmerton Road Roundabout there are some of the biggest changes in median speeds, as in 2019 they were about 20% to 30% of the speed limit but in 2022 median speeds were 30% to 40% of the speed limit, suggesting congestion has reduced over this period at this point.

These slight changes in congestion and delays can most likely be attributed to the change in travel patterns that have occurred since the pandemic, with more people working from home and reduced business travel resulting in slightly fewer cars on the road.

Border Buses had similar results to that of Lothian Buses, but due to differences in the data these are not directly comparable. Their 2019 and 2022 data provided similar locations for the highest delay and lowest speeds. Both data sets for 2019 and 2022 showed areas of congestion on the A701 at Straiton and Bonnyrigg Toll.

[32] Document.ashx (cmis.uk.com)

Forth Valley

The Forth Valley Bus Research study carried out STAG appraisals on five corridors in the Falkirk, Clackmannanshire, and Stirling Council areas.

When looking into the punctuality and reliability of bus services in the Forth Valley region it found that:

- The punctuality and reliability performance of buses prevented potential passengers from using the bus, especially for important events as they could not trust the bus to get them there on time. Reliability was cited as the main factor for not travelling by bus amongst non-users.
- Compared to the car and train, bus journey times are much higher, and it is therefore a much more unattractive mode of transport. This has discouraged a lot of users from using the services more regularly.
- When buses were cancelled, arrived/departed later or earlier than scheduled, or when travel time looked longer than expected, users reported that it was not explained to them why these problems occurred.

To address these issues the Forth Valley research put forward suggested improvements including understanding the causes of such planned and unplanned cancellations and acting on this, and providing warning and real time updates to reduce the impacts when there are cancellations, delays, or timetable changes.

These improvements would help the Forth Valley areas to improve the satisfaction levels of bus users in the area. This is especially important as it was shown previously in Figure 12 that the areas of Falkirk and Clackmannanshire are in the bottom three for passenger satisfaction out of the eight SEStran regions.

Edinburgh

The Transport Appraisal Board put forwards a BPF submission which was led by City of Edinburgh Council in collaboration with the authorities of the City Region, Clackmannanshire, and Falkirk along with input from consultants, SEStran and key bus operators. Of the £204m bid that was submitted, the joint committee were awarded £3.03m although as the BPF has been paused this funding is currently unavailable.

This funding award planned to focus on the main corridors into the city and also on orbital improvements within the city to reduce the impacts of congestion on bus services and to contribute towards improving the bus modal share. In the initial financial years of allocated funding (21/22 and 22/23) the focus was on quick wins with the delivery of bus lanes, a new junction, P&R signals, and orbital route bus stops.

West Lothian Bus Alliance

The West Lothian Bus Alliance brought together West Lothian Council, SEStran, Bus Users Scotland, and the local bus operators for the region in order to access funding opportunities for improving bus infrastructure.

The Bus Alliance's objectives were to:

- Improve bus journey times and reliability
- Encourage more people to use the bus network
- Improve the quality, information, and infrastructure of bus services to make travel by bus more attractive
- Reduce congestion and emissions
- Provide a platform for the future development of a Bus Service Improvement Plan (BSIP)

West Lothian Council had identified six locations where improvements to local bus networks should be carried out: Alderstone Road and Almondale Avenue in Livingston; Bathgate Town Centre; Armadale Cross; Whitburn Cross; and Broxhill and Uphall. Although due to Transport Scotland pausing the Bus Partnership Fund, these improvements will be on hold until this is resumed, or other funding becomes available.

These improvements would contribute towards achieving a smarter and more successful bus network that would maximise the economic and social potential of those living in and visiting West Lothian

Gaps in service provision

The analysis above demonstrates there are potential gaps in bus service provision across the SEStran region which can have significant impacts on the communities served and the environment and economy. These gaps can lead to reduced accessibility to essential services, increased reliance on private vehicles, and potential social isolation for those without access to other forms of transportation. Addressing these challenges is crucial for ensuring equitable access to transportation and for meeting environmental targets.

To understand the impact of these gaps in more detail, analysis was undertaken during the development of the SEStran RTS to understand the relationship between connectivity and the following aspects of deprivation:

- employment
- higher education and levels of education
- healthcare

This analysis was undertaken across the SEStran region using Stantec's Connectivity and Deprivation Audit Tool (CDAT). This tool classifies data zones into three 'tiers' based upon the combination of their level of deprivation, drawing upon the Scottish Index of Multiple Deprivation 2020, and public transport connectivity using a combination of public transport travel times and weightings for the attractiveness of each destination – with the destination linked to the form of deprivation e.g., jobs for employment derivation, tertiary education for education etc.

The tool categorises data zones into three tiers with those in **Tier 3 being the ones where there is a high degree of correlation between poor public transport connectivity (e.g., to jobs) and deprivation domains (e.g., Employment domain)**, relative to other similar geographical areas – i.e., all urban postcodes are compared relative to one another, and all rural postcodes are compared relative to one another.

We have summarised a sample of the analysis below and more detail can be found in the SEStran RTS Case for Change.[33]

In the graphics which follow the red dots signify areas where deprivation is relatively high and connectivity to the 'source' of that deprivation is relatively poor.

The mapping of **employment** deprivation analsyis is shown in Figure 59 below.

[33] SEStran-RTS-Case-for-Change-v3.3.pdf

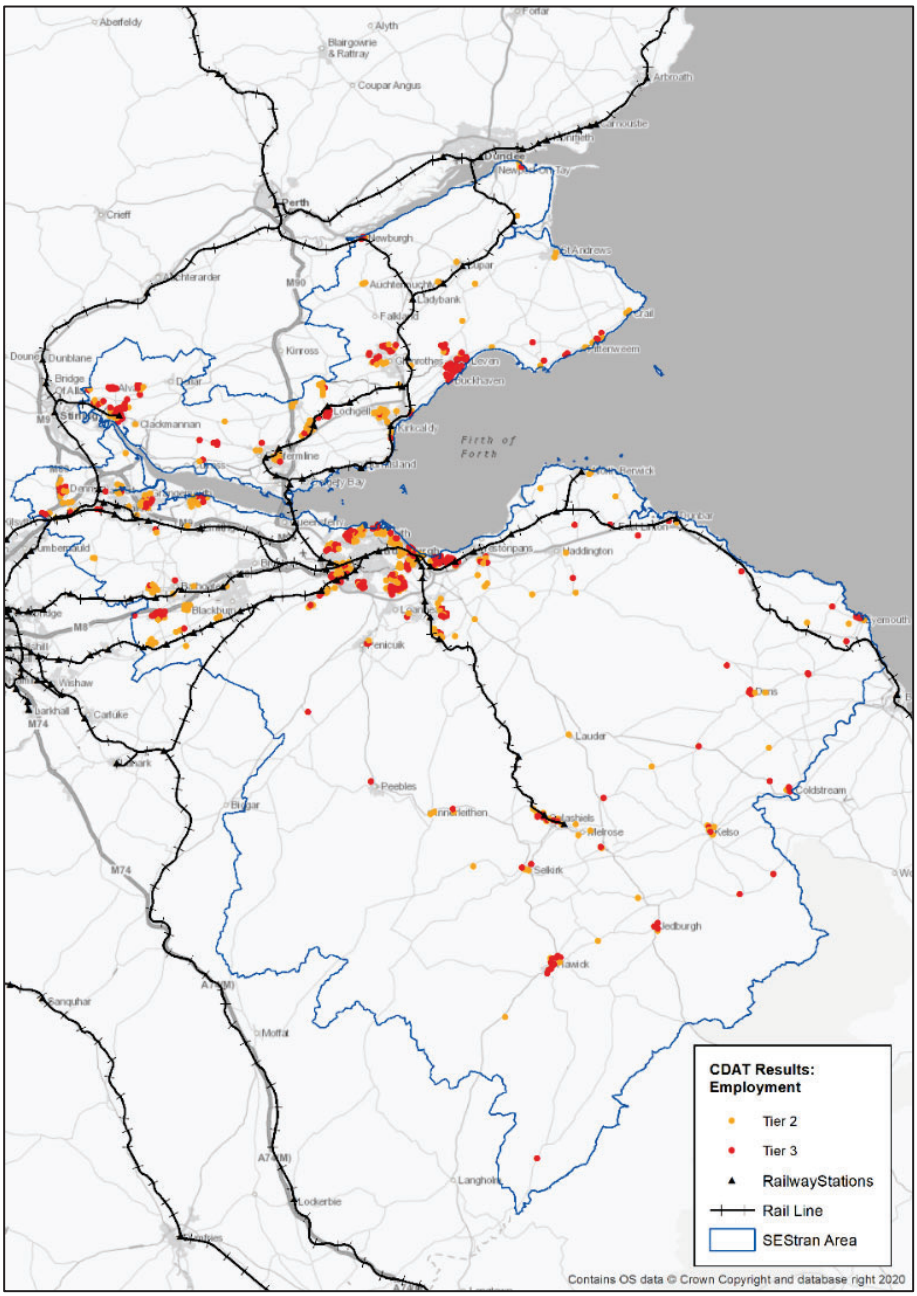


Figure 59: CDAT Connectivity to Employment

There is a concentration of Tier 3 postcodes around the periphery of Edinburgh as well as in Clackmannanshire, Levenmouth and Borders towns such as Hawick indicating high levels of deprivation and poorer connectivity to jobs relative to other similar areas in the region. Improved bus connectivity could widen the choice of jobs available to these communities and potentially improve access to better paid jobs too.

The mapping of **healthcare** deprivation analsyis is shown in Figure 60 below.The mapping of **healthcare** deprivation analsyis is shown in Figure 60 below.

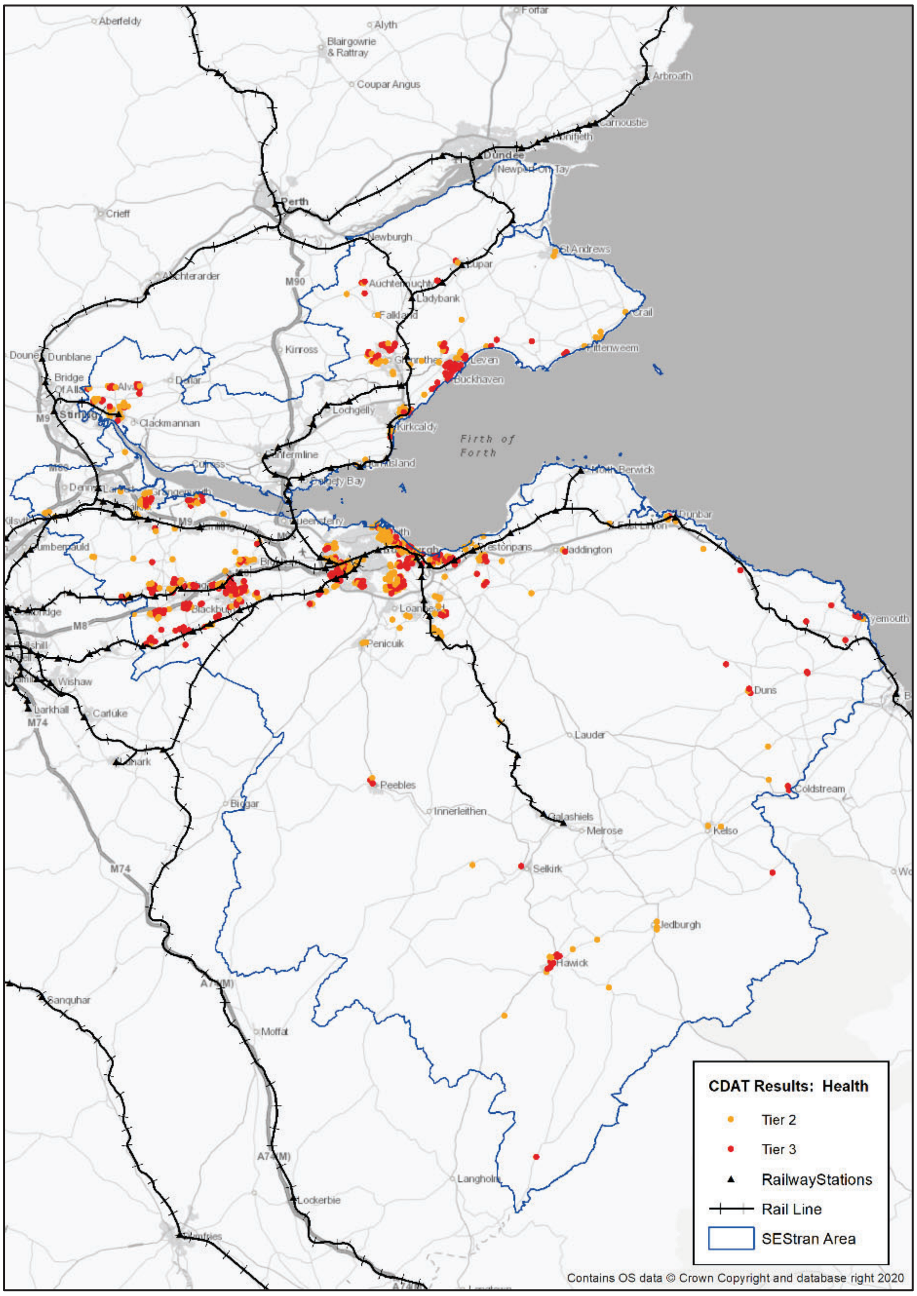


Figure 60: CDAT Connectivity to Healthcare

There are concentrations of Tier 3 postcodes around the periphery of Edinburgh, in West Lothian, Falkirk, Clackmannanshire and the Levenmouth area of Fife in particular.

Key Insight: The important relationship between poor connectivity and high levels of deprivation has been identified. Gaps in bus service provision in the SEStran region leads to reduced connectivity to essential services and life opportunities, increased reliance on private vehicles, and potential social isolation for those without access to other forms of transport. Therefore, providing strong levels of bus connectivity is vital in improving the living standards of people in the region.

PART 4: HOW SERVICES ARE CURRENTLY DELIVERED

Having set out the range of services provided across the region and the connectivity currently delivered for residents of the region, this section sets out how these services are delivered at present.

The following sections consider:

- Recent history – how the operator landscape has evolved in recent years
- Service registrations – examples of how individual services have changed affecting people's ability to make trips by bus
- Fares and tickets – the range of fares and ticket types across the region
- Competition – operator markets and competition between operators, and from increased car ownership, rail and active travel
- Engagement with operators and local authorities – main findings of the engagement undertaken to support the case for change
- Current delivery model and funding – legislation, grants and other funding arrangements and how services are delivered by the different operators across the region

Frequent adjustments to services and operators is confusing for bus users and potential bus users, and uncertainty over services means that **people may not make long-term life choices** (where to live / work, whether to buy a car etc.) based on the existence of a bus service if there is uncertainty about its long term future.

Recent History

Since deregulation in the 1980s, there has been a turbulent period of change in the provision of bus services in the region, particularly by First Bus which before bus deregulation in 1986 was the dominant operator outside Edinburgh.

The bullet points below highlight some of the main changes which have taken place since the turn of the century.

- In **Fife**, under the FifeFirst banner, First Scotland East briefly competed with Stagecoach although this ceased in 2000 and Stagecoach East Scotland remain the dominant operator there.
- In **Midlothian**, First Scotland East began scaling back operations in 2012, withdrawing completely in 2017. Lothian Buses extended its operations into Midlothian and is now the dominant operator, supplemented by through services to the Scottish Borders.
- Services in the **Scottish Borders** were previously operated by First Scotland East and Perryman's, and in 2016 Perryman's took over a number of First routes, the remainder of which were then taken over by West Coast Motors in 2016. West Coast Motors then bought Perryman's forming Borders Buses which operates today.
- First Scotland East withdraws entirely from **East Lothian** in 2016 – Lothian Buses East Coast Buses steps in to fill the gap, now operating as East Coast Buses. Prentice Coaches of Haddington also operates two bus services in the area.
- Lothian Buses expand into West Lothian (operating as Lothian Country) in August 2017, competing with First Scotland East.
- McGills acquires First Scotland East operations in 2022 covering **Falkirk, West Lothian** and **Clackmannanshire**, rebranding these as Midland Bluebird and Eastern Scottish.
- Eastern Scottish covering West Lothian ceased operations in December 2023 with Lothian Buses extending their existing presence in West Lothian to cover the areas affected under the Lothian Country banner. Midland Bluebird continues to operate in Falkirk and Clackmannanshire.

This brief potted history illustrates the scale of change in the delivery of services in the region in the last 20 years or so. It also shows how Lothian Buses has expanded into the Lothians, as other operators have withdrawn. Lothian Buses is now the dominant operator in Edinburgh, East Lothian, Midlothian and West Lothian.

How services have changed in the SEStran region

This section provides an overview of the principal services that have been recently registered and deregistered across the SEStran region and outlines the implications of this relating to the community impact, passenger disruption, and financial impacts.

Lothian Buses has made significant changes to its services in order to improve reliability and to respond to multi modal changes, while trying to maintain access to bus services for communities. In March 2020 changes were made to services to incorporate the Leith walk diversions and other timetable changes. This led to:

- the withdrawal of service 6 due to low customer usage
- service X12 was withdrawn but replaced by X17 and X18
- service X31 had its last evening journey withdrawn due to low customer usage
- services 69 and N34 being cancelled due to low passenger numbers.

From November 2022 Lothian Country withdrew service 276 (from Livingston Centre and Ladywell), service 280 (that linked Livingston Centre to St. John's Hospital and Bathgate). Starting from December 2023, the Lothian Country Network announced two new routes, which includes:

- Service 73, which operates hourly from Monday to Saturday from 7am to 8pm. This service runs between Livingston Central and Blackburn.
- Service 74 to operate between Livingston Centre and Fauldhouse. This will run hourly from Monday to Saturday, between 7am and 8pm, and on Sunday from 9am to 7pm.

In September 2022 Lothian Buses made changes to stabilise the network and improve reliability of services. Service 42 operated by Lothian Buses was removed and service 300 was withdrawn due to low passenger numbers. East Coast buses introduced the new service 141 to reinstate the link between Penicuik and Easter Bush, and to improve connectivity between Pentland Science Park and various other places in Midlothian. Following the introduction of the trams to Newhaven in June 2023, Lothian Buses made changes to services with new and withdrawn services. Service 9 is new and will replace the withdrawn 41 service between the city centre and King's Buildings.

Borders Buses has introduced new services to further improve the bus service in their area. In October 2023 it was announced that the new service 32 (Duns to Berwick-upon-Tweed) was introduced from Monday to Friday.

Midland Bluebird has withdrawn multiple services due to bus competition and newly electrified railways across central Scotland, along with its own operational issues such as driver shortages and long-term passenger decline. In 2023, buses X22, X24, 21, 23, 25, and 26 were withdrawn.

In **Fife** there have been a few commercial services or parts of a service/route that have been withdrawn by Stagecoach East and other operators as well as reduction in frequencies but not to the extent of some other local authorities. In the main the Council has stepped in when these routes have been withdrawn although this has not been to the same level or frequency as the commercial service. This has led to complaints from some communities and service users; however, these routes are unlikely to return due to commercial viability.

There are regular changes to Fife's bus services however these tends to be more small - medium tweaks to services with the odd withdrawal. Stagecoach East Scotland, the main operator in Fife, tends to make two changes per year (one main change and one minor). The changes do tend to raise concerns with communities. The Council also reviews it services on a rolling programme, Fife's contracts are split into South, Mid and North Fife on a 3-4 year contract period, so service changes tend to take place every August to tie in with school transport changes.

The withdrawal of services by Lothian Buses, Stagecoach East, Borders Buses, and Midland Bluebird has significant implications on the communities in the SEStran region.

If services are stopped this can lead to **communities being disconnected and socially isolated** and will likely impact those on low incomes the most who depend on the bus network and cannot afford rail or a private car. This will severely limit the employment and social opportunities available to them, contributing to a further increase in deprivation levels. Also, those who have become disconnected due to the cancelled services could be tempted to buy a private car. This will negatively impact the environment and lead to a long-term decline in bus passenger numbers as they will be unlikely to return to using bus services until the car breaks down.

Deregistering of services will also have impact on businesses across the region with their employees not being able to access their workplace with cancelled services leaving some people isolated, especially those in rural areas. Furthermore, customers may no longer be able to easily access businesses such as stores and restaurants, leading to a reduction in revenues for these establishments.

However, from the previous section there is evidence of newly registered services by Lothian Buses and Borders Buses. The new services will contribute towards reducing social isolation and deprivation levels as people have greater access to employment and social opportunities. Also, it will enable businesses to have a larger, easily accessible consumer base. It will also provide a larger pool of workers to choose from, enabling opportunities for to hire more productive employees.

Key Insight: Operator withdrawal causes fear and uncertainty in the communities affected. Since the turn of the century there has been considerable change of the operator profile in the region and Lothian Buses has extended its operations into East, Mid and West Lothian. Across the region there have been services or parts of routes that have been withdrawn by operators as well as reductions in frequencies. These lost services can have a significant impact on communities in terms of social and economic isolation.

Fares and Tickets

Fares

At UK level, the relative cost of bus travel has risen more than travel by train and by car over a long period of time, as shown in Figure 61. Furthermore, the cost of travel by bus has risen significantly more than the Retail Price Index and indeed average wage increases over this time period.

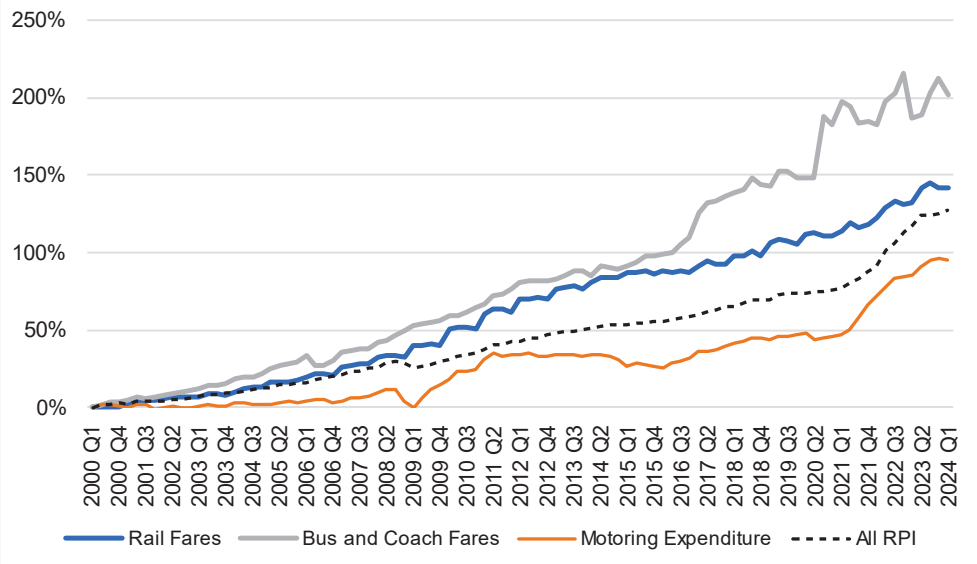


Figure 61: Relative Cost of Travel (2000 Q1 - 2024 Q1, indexed against 2001 Q1 figures)

In Scotland, between 2004-05 and 2022-23, whilst bus fares have increased by 22%, this has largely reflected increasing operating costs per bus-kilometre which have increased by 42% (both in constant prices, i.e., real terms) - similarly, and reflecting the reduction in passenger numbers, the operating cost per passenger has increased by 67% over this period (constant prices). Rising costs for operators alongside fare revenue uncertainty following the COVID-19 pandemic, and reliance on public funding, are other issues that threaten the performance and survival of the bus network.

Between 2005 and 2019, while passenger journeys across Scotland fell by 22%, fares increased by 27% in real terms. This is not to suggest that fares increases were entirely responsible for the decline in passenger journeys, but rather to evidence the circle of bus decline discussed above and its impacts.

In terms of the affordability of fares in the SEStran region, for the most deprived people in society, including those on the lowest incomes, the cost of public transport must be affordable. There is a lack of affordable transport in the SEStran region so many of the region's people are excluded from vital services and opportunities.[34] This is prevalent in passenger surveys which found that a quarter of people are dissatisfied with the value for money of bus services, especially in Fife where the cost of public transport is felt to be disproportionately high.[35]

Research by Transport Scotland found that 64% of respondents said their transport costs were easily affordable but this fell to 55% for households who earn up to £10,000. Some 48% of people said that travel costs affected their choice of transport mode.[36]

[34] SEStran-Main-Issues-Report.pdf
[35] SEStran-2035-Regional-Transport-Strategy.pdf
[36] Public Transport | Transport Scotland

Transport Scotland produced the 'Fair Fares Review' to set out recommendations and plans which contributes to an affordable and accessible public transport system. [37] The review puts forward short term and medium to long-term recommendations to achieve this. Short-term actions for bus include developing a proposal for flat fares, or reduced fares on zonal integrated travel. Medium to long-term plans put forward include governance changes, introducing integrated tickets and fares, tackling the high relative cost of public transport, improving stability of the bus network, and maintain the Nation Concessionary Travel Schemes.

Below are typical single fares for internal travel in key cities and towns in each of the local authorities in the SEStran region:

- Edinburgh - £2
- Livingston - £1.80
- Alloa - £3
- Galashiels - £2
- Falkirk - £2
- Dalkeith - £2
- Haddington - £2
- Kirkcaldy - £2.50

This highlights there is significant variation in fares across the region although the majority of single fares for travel within towns and cities are or near £2. This adds to the inequalities across the region in terms of the bus services provided.

Key Insight: The cost of travel by bus is a problem for some people in the region, limiting their travel choices and life opportunities. The cost of travel by bus has risen more than other modes in recent years as have bus operating costs and fares vary across the region.

Concessionary Fares

The Scottish National Concessionary Travel bus scheme was introduced in April 2006 and is administered by Transport Scotland. The Scottish National Entitlement Card (NEC) provides free bus travel for disabled people plus anyone aged 60 or over. The Young Persons' (Under 22s) Free Bus Travel Scheme provides free bus travel for people aged under 22 years old and was introduced on 31 January 2022. In part, this scheme is intended to get young people into a lifelong habit of bus use. From an operators' perspective, the underlying rationale for these schemes is that the operator is **no better or worse off** as a result of participating in the scheme with revenue being reimbursed at a proportion of the single fare for a given trip – i.e., the revenue lost from existing passengers is counterbalanced by revenue from new passengers who are encouraged to use the bus at zero cost to them.

The number of trips made by concessionary passengers on the Scottish network was broadly flat in the decade prior to the COVID-19 pandemic, at around 145 million. However, the reduction in overall passenger numbers means that between 2006/7 and 2021/22 the proportion of concessionary passengers on the bus network rose from approximately 33% to around 37%, as shown in Figure 62.

[37] fair-fares-review.pdf (transport.gov.scot)

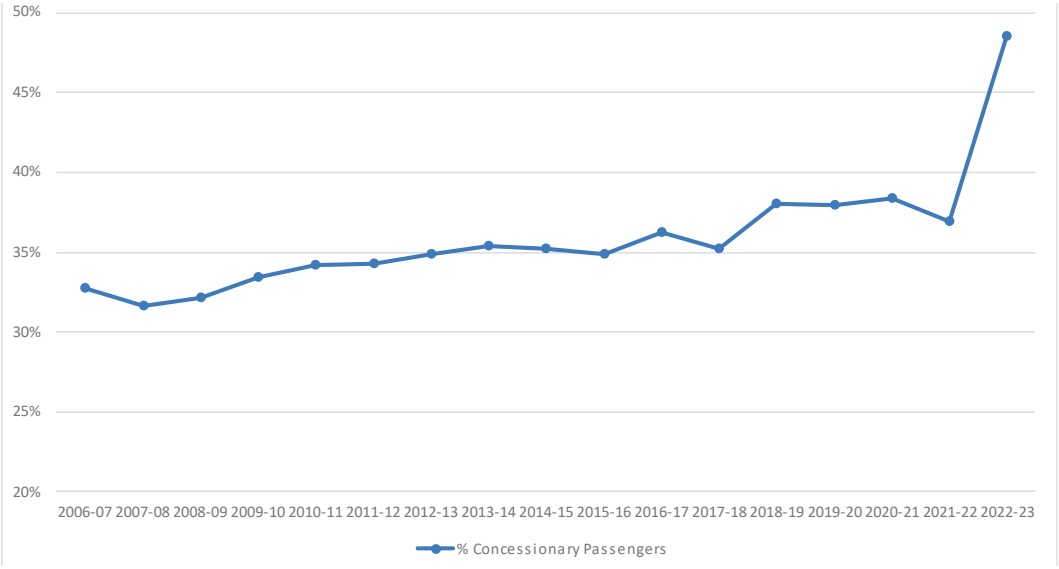


Figure 62: Concessionary bus travel as a percentage of all bus travel (2006/7 - 2022/23)

However, in 2022-23, with the introduction of free bus travel for the under 22s, the quantum of concessionary travel has now surpassed pre-pandemic levels (whilst total bus passenger numbers remain suppressed) and the proportion of total bus passengers travelling free has therefore jumped sharply to 49% of all bus passengers.

Based on usage data of the Young Persons' Free Bus Travel Scheme from its inception in January 2022 until April 2023, the uptake of the under 22s scheme varies significantly across the SEStran region. Edinburgh has the highest uptake in Scotland of 83%, which is much higher than the national uptake of 59%. Falkirk and Clackmannanshire both have the lowest uptake in Scotland of 41%.[38], The City of Edinburgh had 13.8 million journeys and Fife had over 4 million journeys, which were the first and third most journeys out of the Scottish local authorities to use the Young Persons' Free Travel Scheme. This means that this scheme clearly favours those who benefit from high quality bus services over those who do not. In that sense, there is an inherent inequality given the difference in the level of service across the region.

For concessionary travel regarding adults aged 60+ the SEStran region has the highest proportion in Scotland of those with a pass at 90%. Of those who have the card, 11% use it 2 or 3 times per week, 10% use it once per month, and only 1% use it almost every day.[39]

The number of each concessionary fare card type issued in each council area is shown in Figure 63 below.

[38] year-1-evaluation-young-persons-free-bus-travel-scheme.pdf (transport.gov.scot)
[39] Transport and Travel in Scotland 2022 | Transport Scotland

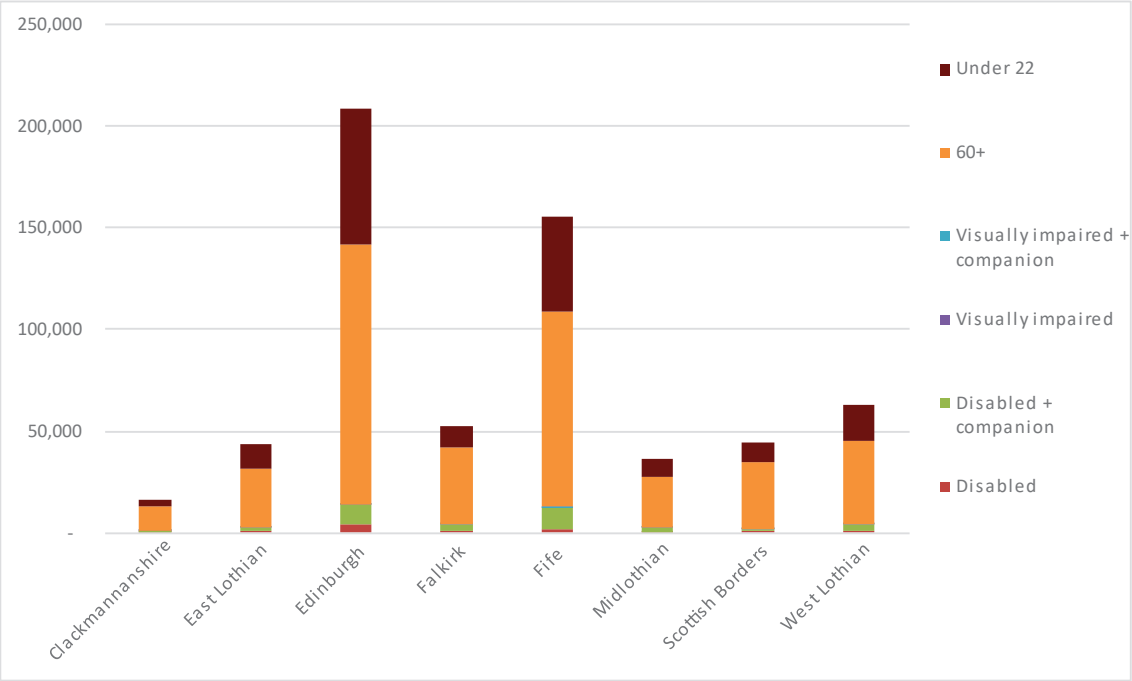


Figure 63: Number of concessionary fares issued for each SEStran local authority (November 2022)

It is important to note that the NEC provides free travel on the bus network only. While the card can be used to obtain a discounted fare on the rail network in very limited circumstances for some groups, it does not enable free travel. Therefore, the concession is not able to be equally used across the region and provides greatest benefit to those with access to good bus services. It also creates a potential financial penalty for concessionary pass holders where the rail network is good and as a result, the bus network is diminished due to strong competition from rail.

The take up of the Under 22s scheme varies widely across the region. Research for Transport Scotland indicated that the City of Edinburg had the highest take up rate in Scotland (83%) whilst Clackmannanshire and Falkirk had the lowest take up rates at 41%.[40] The poor take up in these areas may reflect the relatively poor perception of bus services in these areas.

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

Key Insight: 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. The SEStran region has the highest uptake of concessionary passes fares in Scotland. For concessionary travel for adults aged 60+, the region has the highest proportion in Scotland of those with a pass of 90%, and it also has the lowest level of those who do not use the pass of 50%. For the young people's scheme, participation and usage varies widely across the region reflecting the availability and quality of service, bringing an inequality with some gaining more than others.

Ticketing

With many operators providing services across the region, the structure around the fares being offered can become complex for bus users with single and multi-operator ticket types being available, with the services covering a range of different zones.

In the SEStran 2035 Regional Transport Strategy, stakeholders highlighted the lack of integrated ticketing for public transport and active travel mixed mode journeys in the area, leading to a key policy aim of delivering an integrated ticketing system across all modes of transport in the SEStran region. The RTS also identified better multimodal ticketing was needed between public transport operators.

[40] year-1-evaluation-young-persons-free-bus-travel-scheme.pdf (transport.gov.scot) (Figure 1)

To illustrate this, the tickets offered by the four main operators in the region, Stagecoach, Lothian Buses, Midland Bluebird, and Borders Buses are shown in Figure 64 below. Note also that Lothian Buses now operate a daily and weekly fare cap for contactless payment made with the same card.

There is also the main multi-operator ticket available to customers shown at the top, with the differing ticket types, ticket lengths, and varying zones within which the tickets are valid noted below. The separate retailing of tickets by operators and lack of multi-operator ticket options creates a further complication to bus travel and can deter people from using the services.

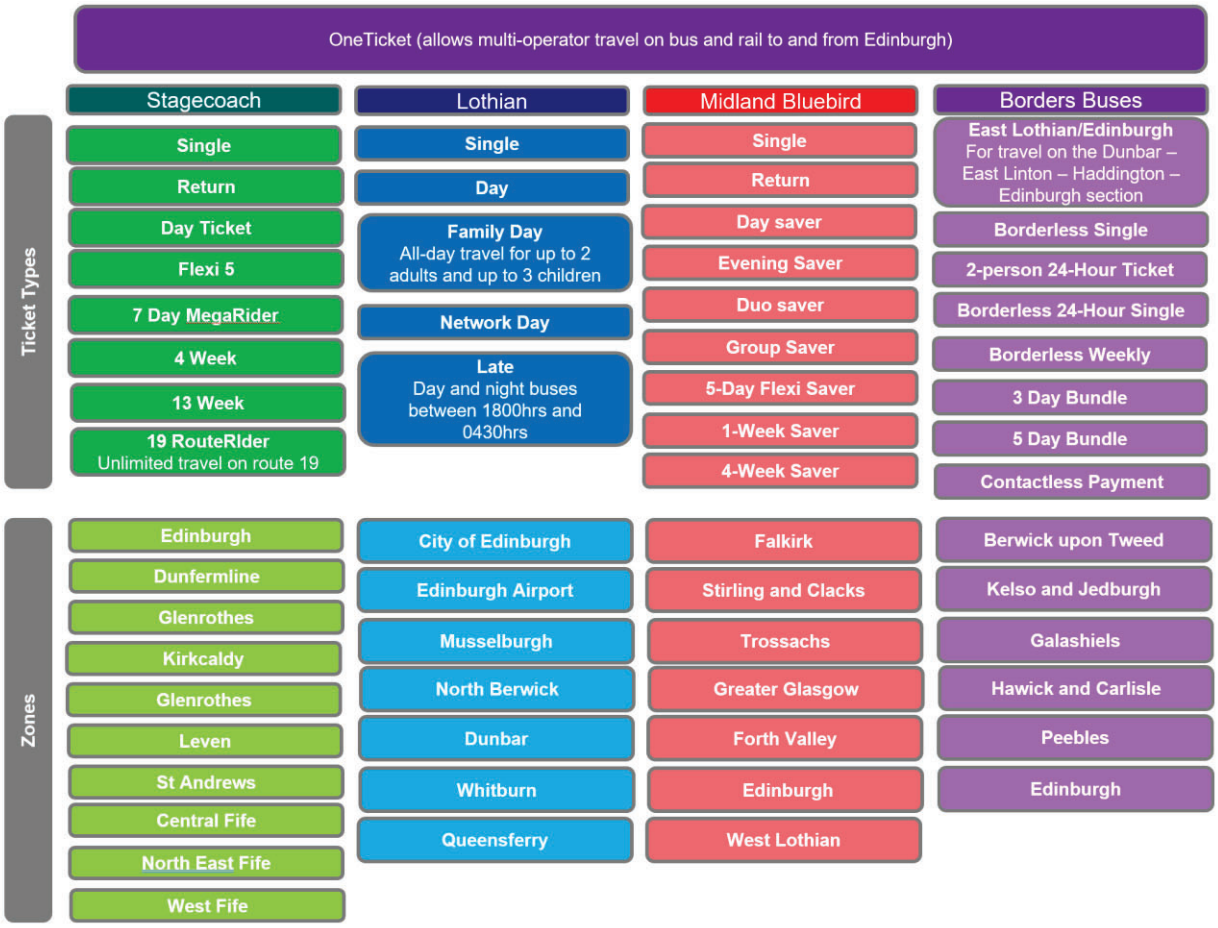


Figure 64: Illustration of ticketing for the four main bus operators in the region

OneTicket was established in 2001 in a collaboration between SEStran and the main public transport operators with the aim of providing convenient and integrated ticketing for multi-operator travel in and around Edinburgh. The aim of the scheme was to make travel by all public transport easier, which would result in an increase in patronage for public transport services and would contribute towards a modal shift away from the private car. OneTicket offers an array of 1-day, 7-day, 28-day, and annual tickets for travel to/from Edinburgh and within SEStran local authority areas, see Figure 65. There are also 3 and 5-day ticket bundles (to be used within 14 days) and 10-day ticket bundles (to be used within 28 days).

Figure 65: OneTicket zone map

In 2023, a modest 4,000 tickets were sold across all OneTicket types and zones. There is significant variation between the different areas in terms of what ticket types are being purchased and the volume of these being purchased. In the Edinburgh Smartzone adult Day tickets had over 700 sales in 2023 compared to sales of below 5 for the equivalent ticket in the Scottish Borders.

In 2023 there was a 62% reduction in the number of OneTicket tickets sold. This could be a result of reduced demand for bus services after the pandemic, the introduction of the £2 fare for single trips and fare capping across the Lothian Bus network and changes in the pattern of bus use with fewer people commuting five days per week. It may also be that not everyone might be aware of the OneTicket scheme and its benefits. However, this trend may be changing as there have already been more OneTicket sales in the first 5 months of 2024 than the whole of 2023.

This wide range of tickets undoubtedly provides cheaper travel for many people compared to paying standard single fares, especially regular bus users who can navigate the options to get the best deal for them. The number of options can cause a 'choice overload' for the consumer though, with the level of options possibly acting as a deterrent to those who rarely or never use the bus. Also, these products are primarily issued by individual operators which can effectively tie people to these operators, eroding competition. For example, someone travelling in Edinburgh will be unlikely to use another operator's service if they have already used Lothian Buses services and are hence benefitting from the daily / weekly cap.

Key Insight: Ticketing options are complex across the region. Most tickets are also only useable on a single operator's services. More simple 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 OneTicket platform is not widely used.

Analysis of Transport Focus ticket data

The 2023 'Your Bus Journey' results for the SEStran region were published in April 2024. The survey is run by Transport Focus, an independent consumer organisation representing the interests of transport users. This looks at SEStran bus user data, what proportion of ticket types were purchased, the different methods for how users pay for their ticket, and the satisfaction of users with value for money of tickets.

Figure 66 shows that 50% of bus users pay for their tickets, whereas 44% use a free pass which is available to those with a disability, aged 60+ and those aged under 22. Of the 50% who pay for their journeys, the three most popular ticket typed are a single, season ticket, and a day pass which have proportions of 41%, 27%, and 16% respectively. There is also a significant majority (70%) of these journeys which are undertaken on only one bus company.

Ticket data regarding how bus passengers paid for the bus is shown in Figure 67. Passengers in the SEStran region paid by contactless for 32% of journeys and by smartcard for 29% of journeys, which were both higher than the Scottish levels which saw 23% use contactless and 22% use smartcards. In contrast, users across Scotland were more likely to use a paperless ticket, cash, or by showing/scanning a ticket from an iPhone. This suggests SEStran bus users have adapted better to modern methods of paying on the bus compared to other areas of Scotland. The support of contactless payments is also shown with 60% of SEStran users purchasing tickets using this method.

The satisfaction with the value of bus tickets is highlighted in Figure 68. The data shows 69% of SEStran fare-payers are either 'very satisfied' or 'fairly satisfied' with the value for money of the journey, whereas 16% are either 'very dissatisfied' or 'fairly dissatisfied'. These results are very similar to that seen across Scotland. These figures are influenced the most by 'the cost for the distance travelled' and 'the cost of the bus compared to other modes of transport'.

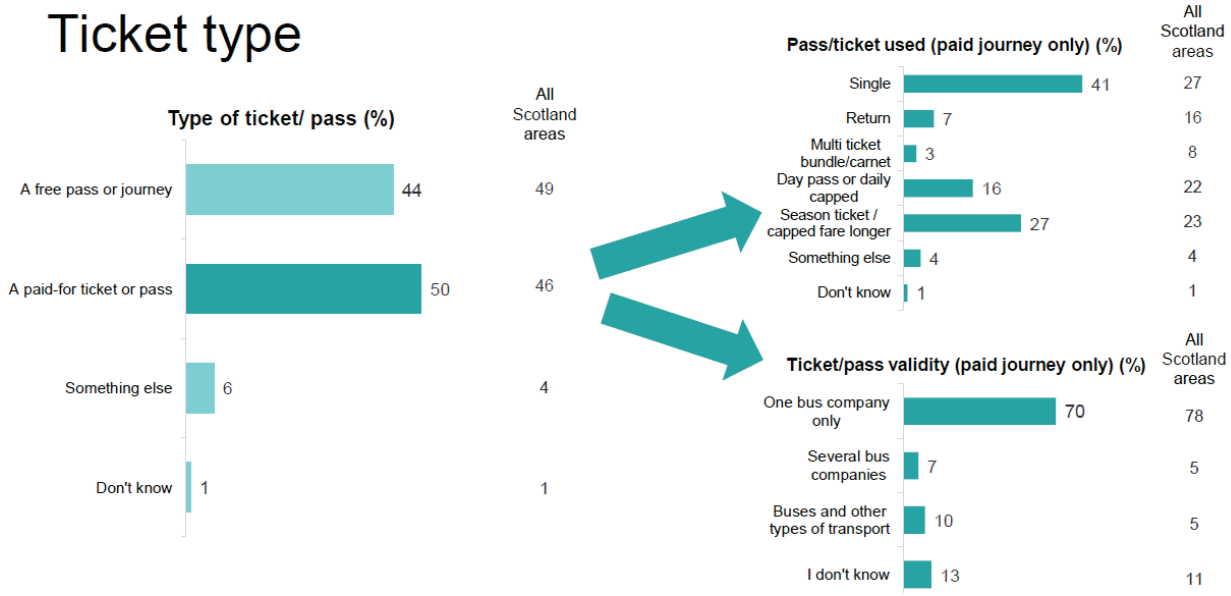


Figure 66: SEStran tickets purchased

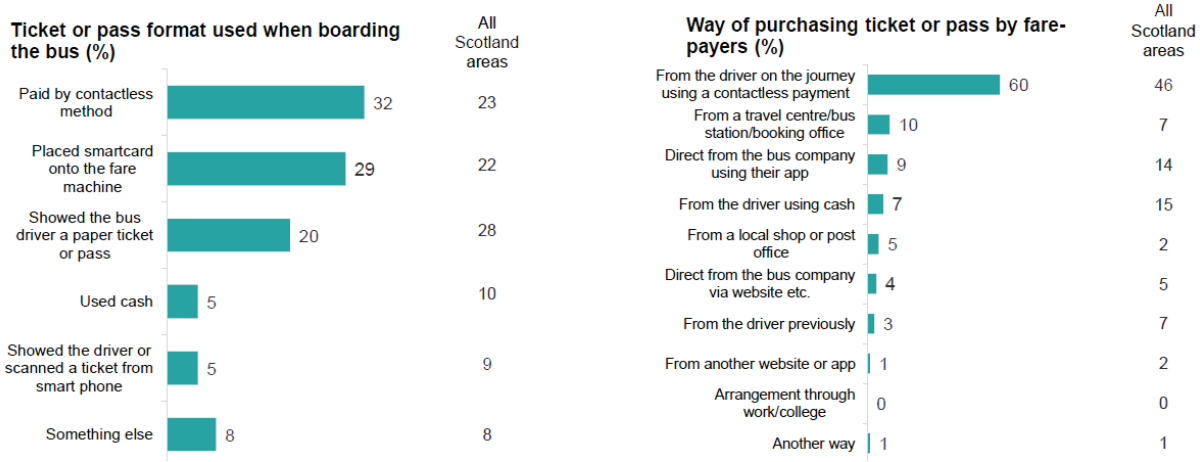


Figure 67: Ticket boarding and purchasing types

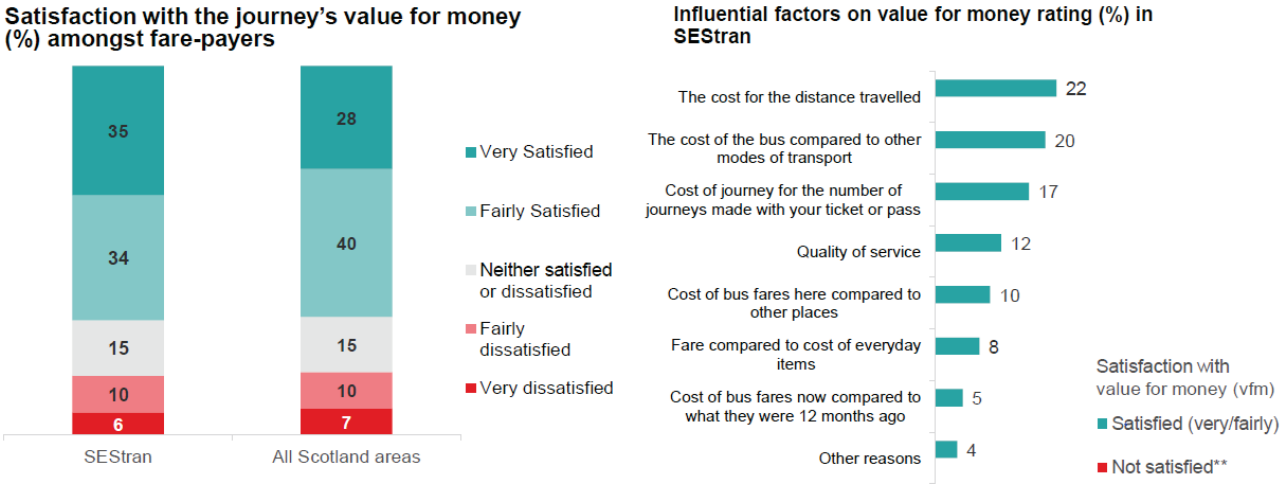


Figure 68: Value for money satisfaction and factors influencing Value for Money

Key Insight:

Transport Focus data shows:

- High levels of concessionary fares use, consistent with the Transport and Travel in Scotland 2022 survey
- Majority of tickets purchased are for single operator tickets, although a significant minority used multiple operators, including rail services
- High use of contactless and smartcards to pay for fares
- Fare payers were in the most part at least fairly satisfied with the value for money of their ticket

Competition

Competition amongst operators

Bus operators plan and operate local bus services after they are registered with the Traffic Commissioner. Operators compete for passengers 'on street', seeking to differentiate themselves by the quality of service offered and fares available.

While there are 24 operators providing services within the region, four main operators operate over 88% of all bus mileage: Lothian Buses (44%), Stagecoach East Scotland (26%), Borders Buses (10%), and Midland Bluebird (9%).

Most local authorities have a dominant operator, and this varies across the local authorities. Borders Buses is the dominant operator for the Scottish Borders, and Lothian Buses dominate the services in City of Edinburgh, East Lothian, Midlothian, and West Lothian. Stagecoach East Scotland is the dominant operator in Fife, and Midland Bluebird is the most dominant in Clackmannanshire and Falkirk. Through our engagement on this study and partly reflecting this, local authorities have highlighted a lack of competition for bus tendering contracts.

Furthermore, mapping of the number of operators serving each bus stop across the region (shown in Figure 69 below), shows that **64% of bus stops are served by a single operator**, illustrating that people who are served by these stops do not see the foreseen benefits of competition.

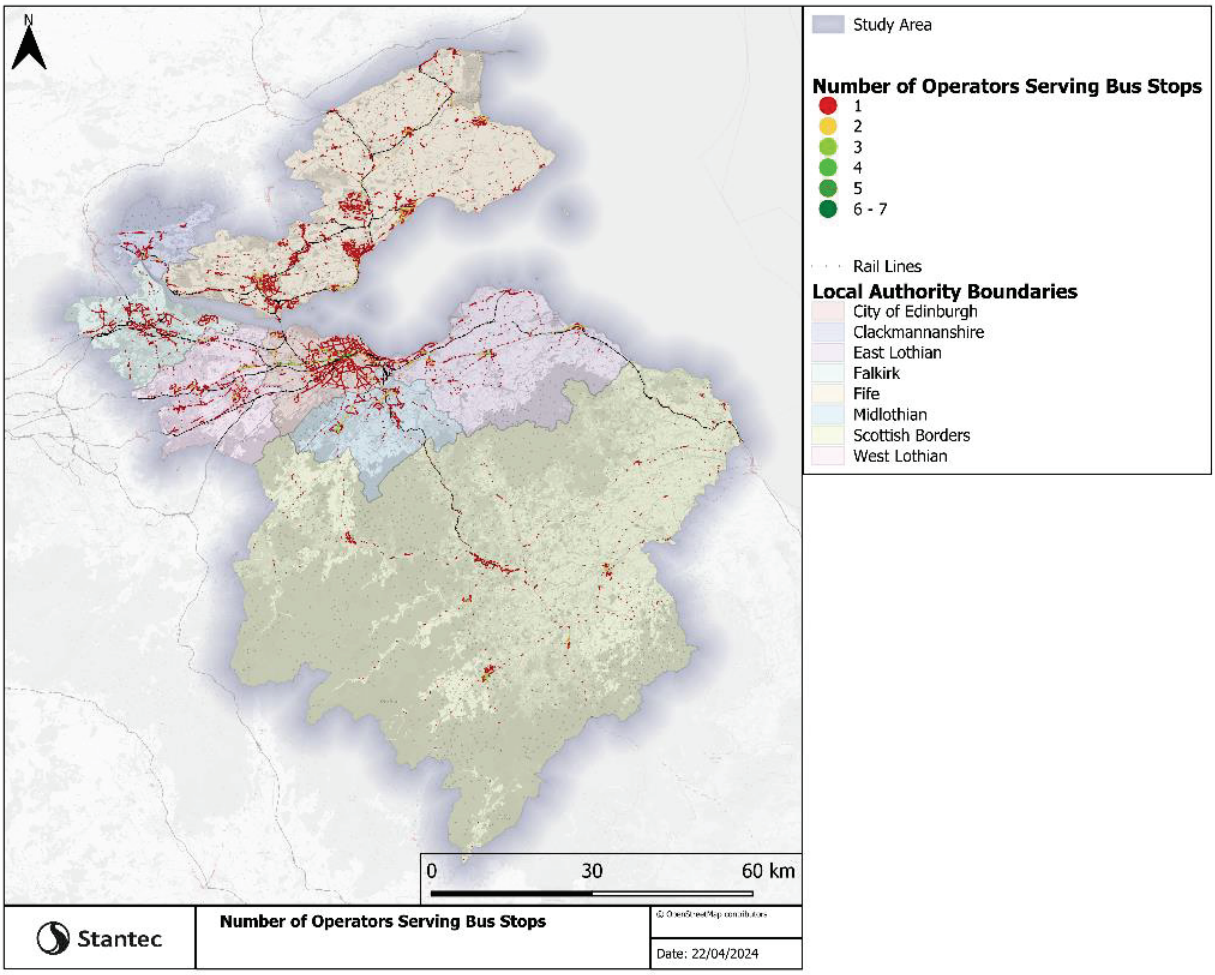


Figure 69: Number of operators serving each bus stop

There is a large variation between local authorities in terms of the percentage of bus stops that are served by a single operator, shown in Table 5.

Table 5: Proportion of bus stops served by a single operator for the local authorities

Local Authority	% Bus stops served by a single operator
Clackmannanshire	45%
East Lothian	54%
City of Edinburgh	72%
Falkirk	94%
Fife	50%
Midlothian	62%
Scottish Borders	75%
West Lothian	69%

Table 5 shows that areas such as Falkirk who have 94% of bus stops served only by one operator, are less likely to benefit from the advantages of competition, such as a reduction in price and increase in quality of services, than bus users in Clackmannanshire where only 45% of bus stops are served by a single operator.

The coverage of the operators can be seen in Figure 70, Figure 71, Figure 72, and Figure 73 which follow with maps showing the bus network for each of the main operators and their segment frequencies (services per hour) showing where each of the operators services are concentrated. Figure 74 shows the bus and coach network for all other operators.

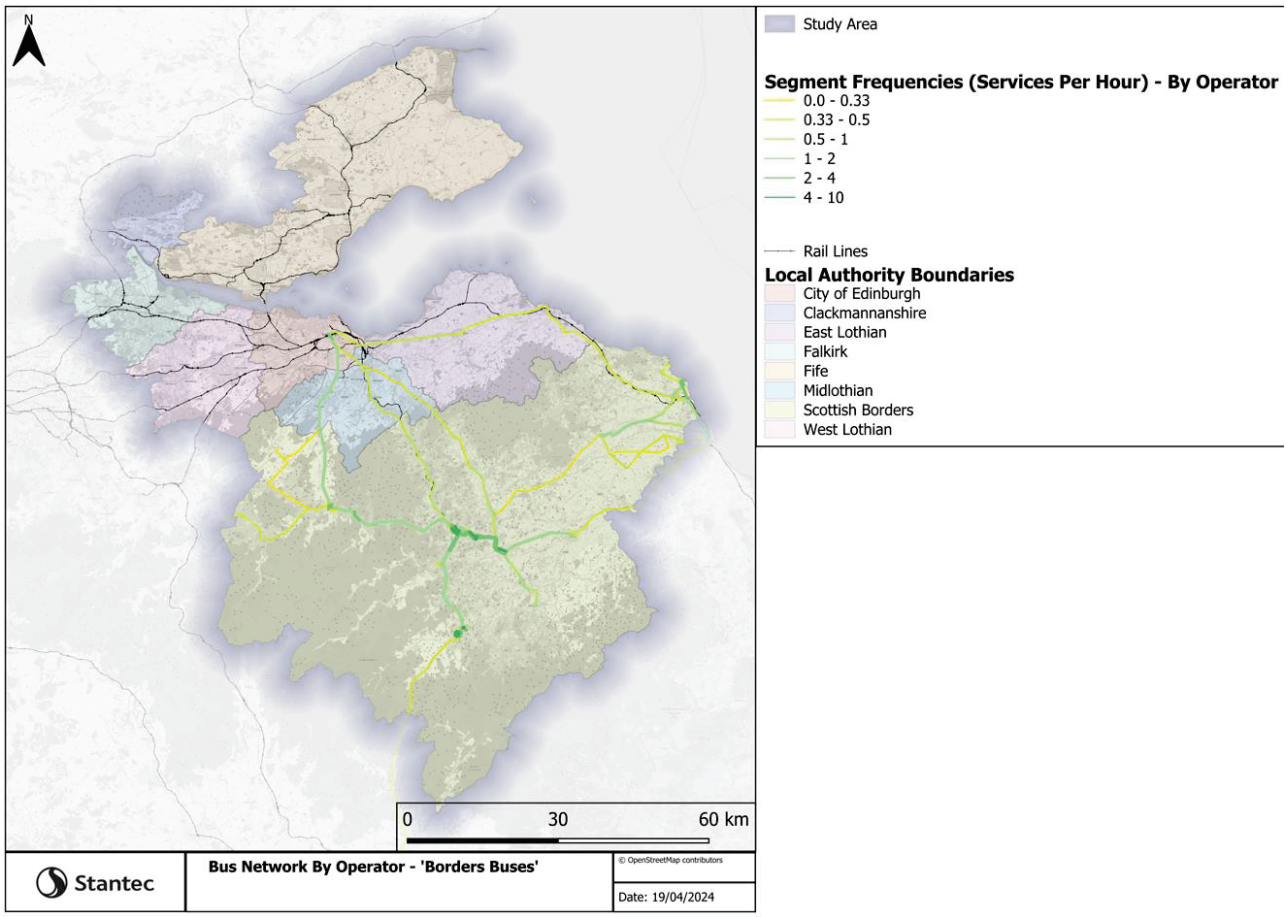


Figure 70: Borders Buses Bus Network

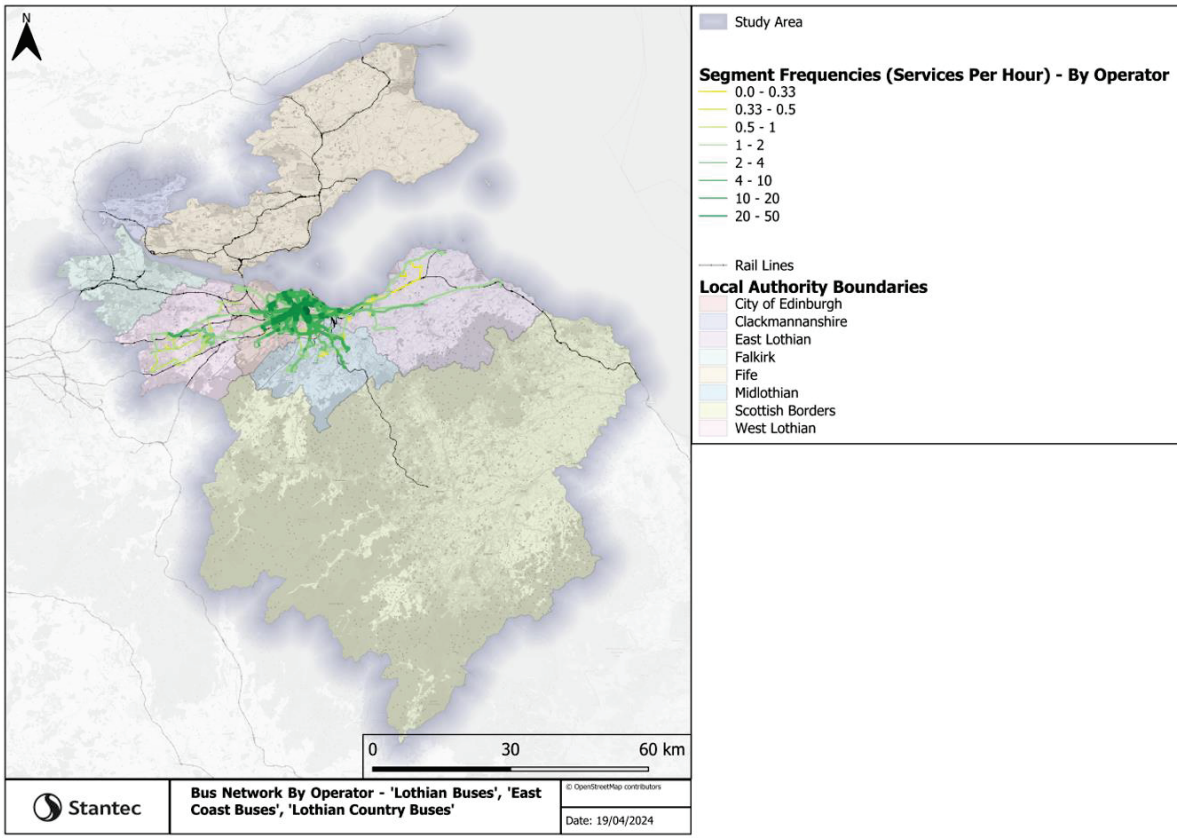


Figure 71: Lothian Buses Bus Network

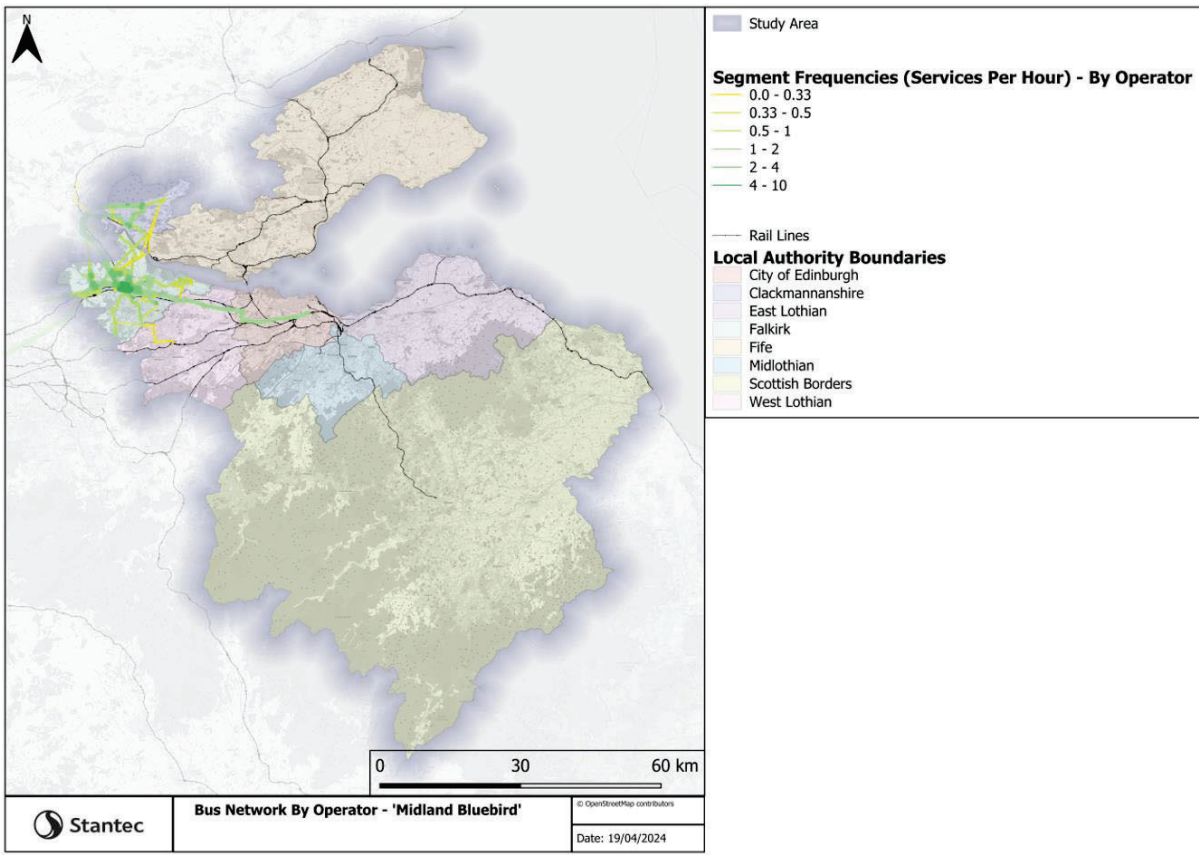


Figure 72: Midland Bluebird Bus Network

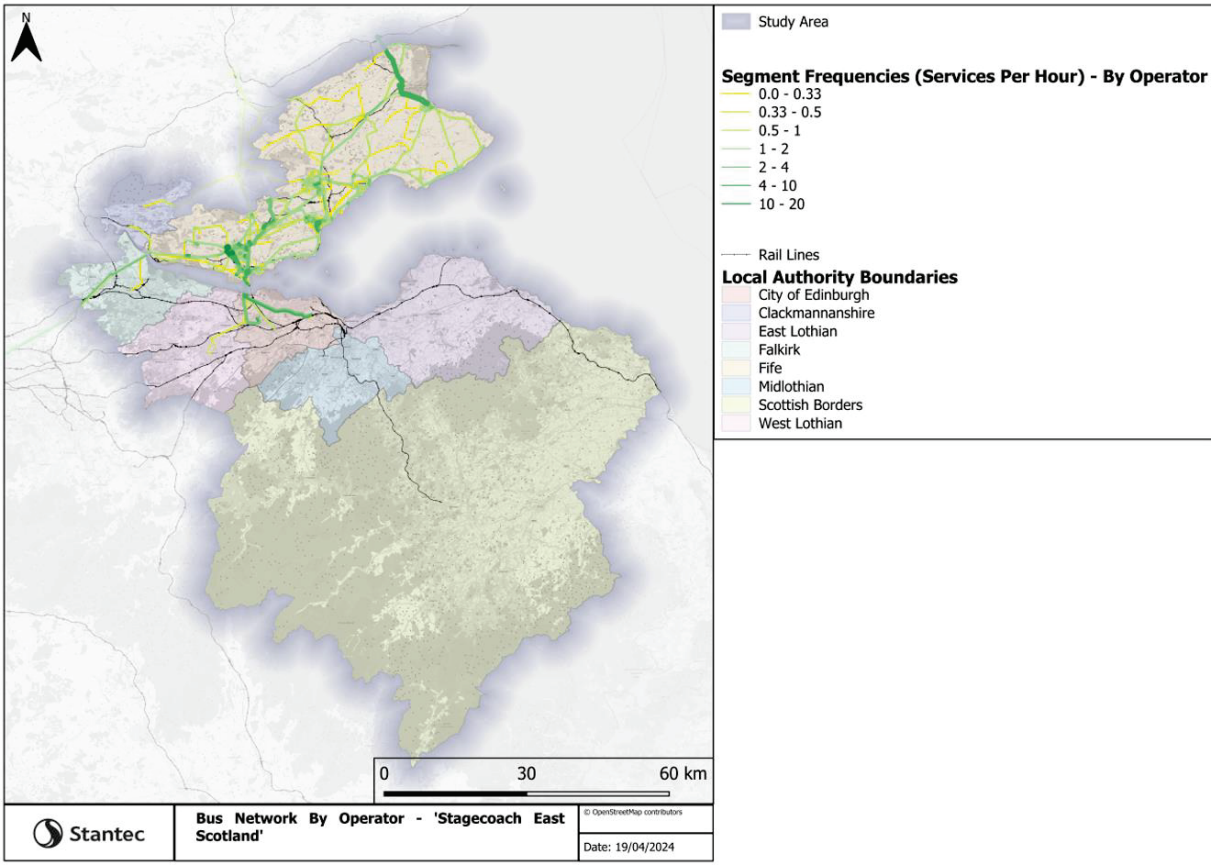


Figure 73: Stagecoach East Scotland Bus Network

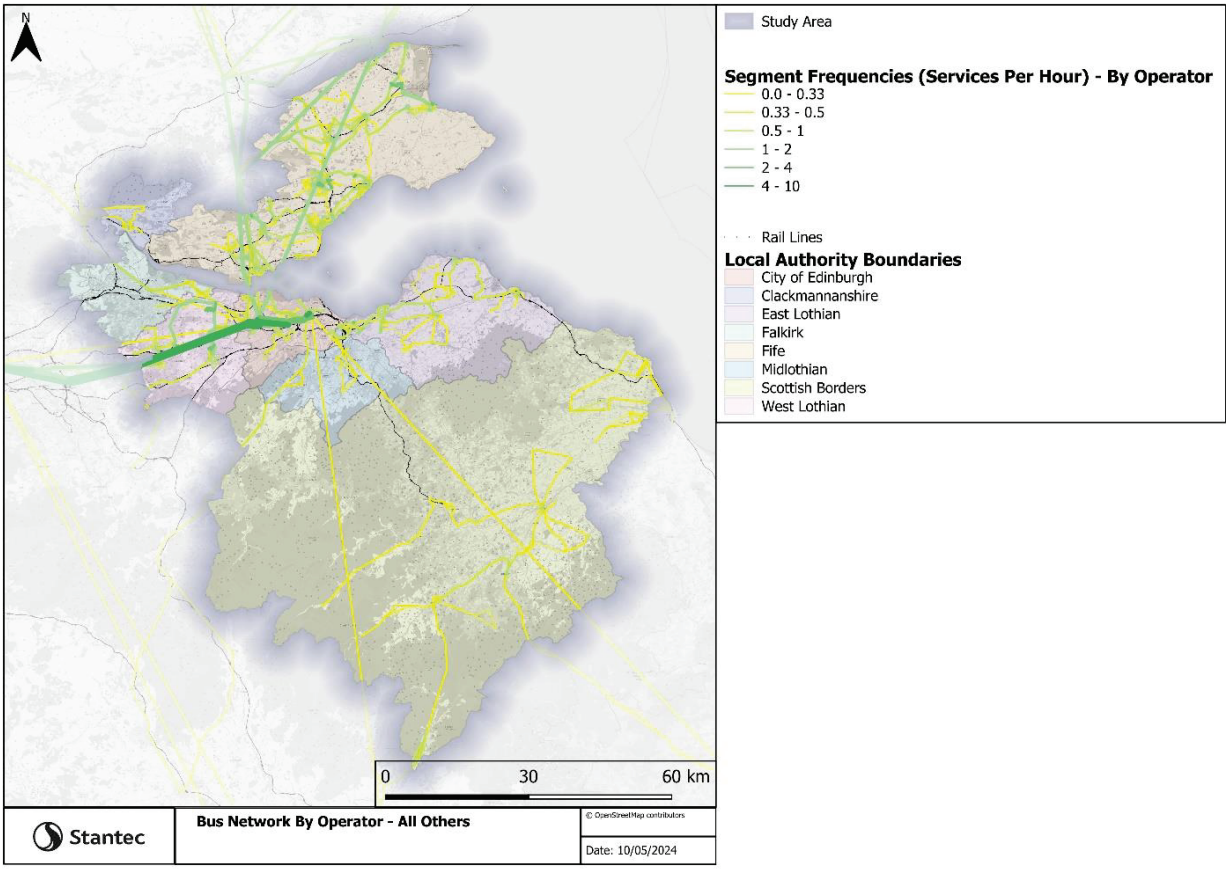


Figure 74: All Other Bus and Coach Operators Bus Network

The deregulated bus market (enabled through the Transport Act 1985) was set up to promote competition and ensure greater passenger choice, with the anticipation that competition would incentivise operators to keep costs down, lower fares and provide services which customers want. Considering the dominance of the four major operators across much of the region, and the majority of bus stops only being served by a single operator, there is a lack of competition in terms of services and fares (and by extension affordability) across the region. In effect, local monopolies are in operation across most of the region.

In the absence of the on-road competition envisaged when bus services were deregulated in 1986, other mechanisms may be required to ensure passengers benefit from attractive bus services in the region. Where competition does exist, predominantly on some of the main routes into the City of Edinburgh, it is clear from Figure 36 showing the *most frequent and accessible stops* mapping below that some routes can have in excess of 20 services per hour, potentially leading to bus congestion. Also, with tickets and apps and fare capping restricted to single operators, many passengers will use only their 'normal' operator when given a choice.

Key Insight: There is little in the way of genuine competition across the region. Most local authorities have a dominant operator and where operators 'overlap', this tends to be on main roads which buses naturally funnel along, predominantly the main radial routes into urban centres, especially Edinburgh. Local authorities have highlighted a lack of competition for bus tendering contracts. There is therefore little evidence that the anticipated benefits of competition are being directly realised by the passenger.

Competition from Car

Perhaps the greatest contributor to the long-term decline in bus use is the increased car ownership / availability.

DfT reports the number of vehicles registered by type at the local authority level since 2009.[41] This shows that the number of cars in the SEStran region increased by 93,000 (15%) between 2009Q4 and 2023Q4 to 727,000, equating to 444 cars per 1,000 population. The level of car ownership by this measure varies widely across the region, the lowest being in the City of Edinburgh (335) and highest in the Scottish Borders at 530.

[41] https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables (VEH105)

This level of increase in the number of cars in the region is clearly not sustainable in the medium term given the requirements for rod space and parking and the range of other impacts associated with car ownership and use.

The Scottish Household Survey also records the number of cars owned per household at the local authority level from 2012. Figure 75 below shows the percentage of households with one or more cars by local authority in 2012 and 2022.

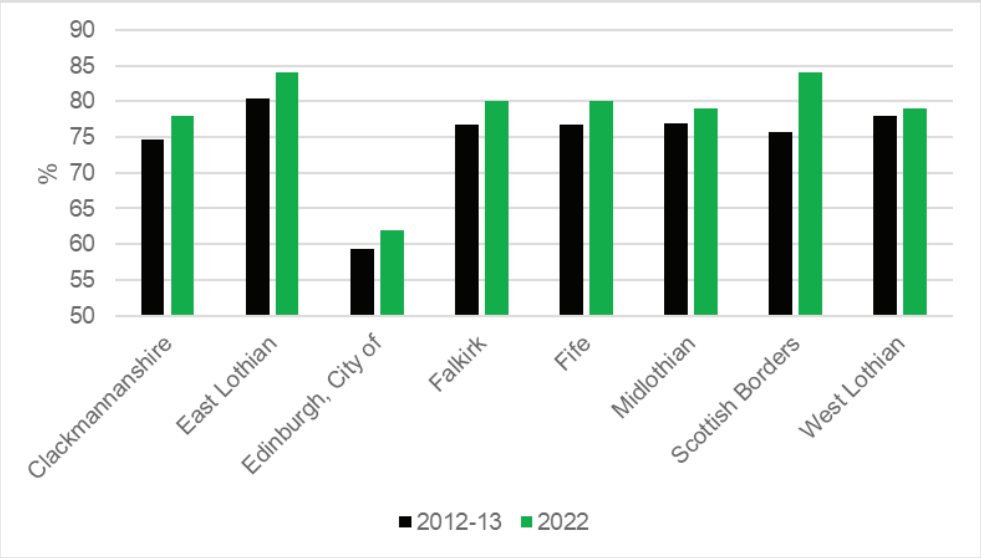


Figure 75: % of Households with one or more car, 2012-13 and 2022 (SHS)

Household car ownership has continued to rise over this period with all local authority areas seeing growth, including the City of Edinburgh.

Altthough car ownership has grown, there are still significant numbers of households without access to a car. In 2022, across the SEStran region, 26% of households did not have access to car, down from 29% in 2012. Some 38% of households in the City of Edinburgh do not have access to a car and even in the Scottish Borders, this figure is 16%. These households will be reliant on public transport, lifts, taxis, community transport to get around.

Key Insight: The number of cars on the road continues to rise and household car ownership is increasing in all local authority areas, including Edinburgh. This increase is clearly not sustainable given the implied demand for road space and the range of negative impacts of car use across the region. Once an individual has access to a car, they will generally travel by car rather than bus unless there is a compelling reason not to do so such as expensive parking charges or lack of parking. There are also a substantial minority of households without access to a car who will be impacted by the trend of reducing bus services. Rising car ownership contributes to reduced passenger numbers which in turn can lead to reductions in bus services / higher fares which has a further negative impact on those without access to a car.

Competition from Rail

There has been significant growth in rail services around the SEStran region, with the expansion of services and improvement of railway lines:

- Borders Railway – This new stretch of rail, which opened in 2015, opened up Midlothian and the Scottish Borders for the first time since 1969 by going from Edinburgh Waverley to Tweedbank[42]
- East Coast Mainline – This rail routes connects over 20 million passengers a year from Edinburgh to London. It is currently undergoing a £1.2bn upgrade to replace signalling, overhead line equipment, and a new track layout.[43] It also features reopened stations at Reston (2022) and East Linton (2023), both in the Scottish Borders.

[42] Borders Railway Line | Edinburgh | Tweedbank (scotrail.co.uk)
[43] East Coast route - Network Rail

- Fife Circle Line this line links over 10 towns in Fife, so travelling between them by rail is simple.[44] It connects south Fife, coastal towns in Firth and Forth, and Edinburgh. A £55m electrification of the track between Haymarket and Dalmeny is currently in progress and is set to be completed by December 2024.
- Levenmouth link – rail services are set to return to Levenmouth after a £116m Scottish Government investment into the project that will reconnect the communities of Fife after 55 years.[45]
- Airdrie-Bathgate Rail Link reinstatement – this was a £300 million investment by Transport Scotland, with the aim to improve access for people living in North Lanarkshire and West Lothian to Glasgow and Edinburgh by electrifying the track, laying new track, and constructing new stations (at Caldercruix, Blackridge and Armadale – the latter two in West Lothian).
- Shotts line – This line links Glasgow Central and Edinburgh Waverley via Shotts, and recently underwent £160m of electrification improvements.
- Carstairs line – As part of the Scottish Government's plan, the Carstairs rail track was re-configured and renewed, along with associated signals and overhead lines. This was completed in spring 2024.

There have been large amounts of investment into improving commuter lines in Edinburgh. This includes the significant investment into the Edinburgh Glasgow Improvement Programme (EGIP) that is delivered station redevelopments, electrification of the Cumbernauld line and introduction of electric trains, a new Edinburgh Gateway Rail/Tram interchange, electrification of the Edinburgh to Glasgow via Falkirk High Line and the opening of Edinburgh Gateway station with connection to Fife line services, and the transformation of Queen Street Station.

The improvements to rail through electrification, the opening of new stations, and connectivity improvements have improved the attractiveness and reliability of these services. This has contributed to the substantial increase in rail patronage prior to the pandemic previously seen in Figure 11, and will have contributed to the reduced number of passengers seen on bus services.

Key Insight: Rail services play a key role in linking up the region and providing connectivity to external locations. There has been significant investment in the rail network to improve the attractiveness and reliability of these services, and these will have undermined the viability of parallel bus services. However, buses are particularly important to areas not served by the rail network, including much of rural SEStran.

Competition from Active Travel

Active travel and public transport in Scotland often compete for resources due to their overlapping goals and the limited funding available. Despite its benefits (promoting physical activity, reducing carbon emissions, and can alleviate road congestion), active travel accounts for a small percentage of total distance travelled in Scotland and shifting a significant portion of car trips to more sustainable modes will require more than short-distance active travel initiatives. Active travel and fast, reliable bus services both require infrastructure development, such as bike lanes for cyclists and bus lanes for public transport. This can lead to competition for physical space on the road as well as funding.

The design of urban spaces must balance the needs of buses and active travellers. This can lead to conflicts when allocating road space for bus lanes versus bike lanes and pedestrian paths. All modes aim to provide safe and accessible options for users. However, creating protected bike lanes and pedestrian zones can reduce the space available for buses, potentially impacting their routes and efficiency.

Through our engagement on the study there is a feeling amongst local authorities and bus operators that active travel and public transport sometimes do compete for resources. There's a growing recognition of the need for integrated planning and investment to ensure that both modes can thrive and contribute to sustainable and healthy environment in the SEStran region. Local authorities play a crucial role in this process by developing plans and infrastructure that support both active travel and public transport, creating a more cohesive transport network.

Key Insight: Active travel and bus services compete for road space, particularly in urban areas and investment funding. There is a need to integrate planning and investment across all modes and a balanced approach to the allocation of road space between bus and active travel in our major settlements.

[44] Welcome to Fife - Rail
[45] 100-day countdown to Levenmouth Rail Link | Fife Council

Engagement

The development of this Case for Change involved a workshop with all eight local authorities across the SEStran region and two workshops with bus and coach operators who were invited to join the engagement sessions.

Local Authority Engagement

Discussion with local authority officers explored (i) the current bus network and its ability to adequately serve communities, (ii) competition around services and fares, (iii) whether there was anything specific influencing bus patronage in their areas, and (iv) models of funding and operation.

A range of feedback was received and while this varied across local authorities (predominantly reflecting the urban and rural differences), some themes were consistent throughout. Some of the most pertinent issues discussed included:

- The general lack of demand for bus services, especially from older and disabled people post-pandemic
- Rising costs which are putting a strain on local authorities' budgets, leading to reductions in supported bus services
- Preference for other modes such as rail due to bus service frequency and journey times
- Lack of joined up ticketing and coordination with rail services
- Uncertain and insufficient sources of funding, with the BPF being paused in 2024-25
- Technology and the high cost per passenger are limiting opportunities around DRT

Some of the local authorities agreed that (i) there are not enough passengers to generate enough revenue to make some of the services financially sustainable and (ii) even where there is high demand a lot of these passengers are under 22s and over 60s who receive free travel on buses leading to 'lost' revenues for buses. On this point, it is noted that these schemes are intended to make bus operators no better or worse off, i.e., the revenue they 'lose' by only getting a proportion of the fare foregone is balanced by the additional revenue from new passengers who now travel for free.

The general decline in passenger demand and the rising costs of operating services has led to a lack of competition for bus tendering contracts, and increased tender prices. Along with this, the withdrawal of funding sources such as the BPF has impacted the future financial sustainability of the bus sector.

The different problems that face the City of Edinburgh compared to the other local authorities was also highlighted. In the City of Edinburgh congestion experienced by buses is a major an issue whereas generally outside of Edinburgh there are not enough serves to reach those living in rural areas, with congestion being more limited to the main corridors.

Bus Operator Engagement

Two bus operator engagement workshops were carried out to gain a greater insight into what they felt the main issues were and what needed to be addressed in this Regional Bus Strategy. Those in attendance included the main operators from the SEStran region. During these sessions data was presented around the existing situation of the bus network in South East Scotland which was supported by the operators to be an accurate reflection of the bus industry.

Following the discussions in these workshops the main issues for operators included the uncertainty around funding and the struggle with the falling demand for services. Both issues were strongly linked for the operators. The pausing of the Bus Partnership Fund has had a negative impact as there is no other way infrastructure improvements can be financed. A lack of bus priority and information provision will make it harder to increase passenger levels.

Different operators have different perceptions about whether they lose, gain or are no better or worse off as a result of the scheme.

Declining demand for bus services was mentioned in both the local authority and bus operator engagement sessions. Bus operators attributed this to:

- Change in travel patterns following COVID-19 with an increase in the proportion of leisure trips and people working from home. There has also been a change in the standard peak hours of bus travel due to people working from home and the operators are still figuring out how best to deliver services in response to this
- A large number of passengers lost during the COVID-19 pandemic have not returned to using buses
- Car ownership is very high in rural areas, especially in the Scottish Borders.

Coach services

From the engagement workshops, we received useful feedback regarding the areas for optimism and concerns for longer-distance coach operators, whose services provide some important links across the region. A key point highlighted by a coach operator is that longer distance and interurban coaches are distinct from local bus services. Even though they operate on local bus registrations and legal frameworks, it is a very different market and therefore they face quite different challenges and opportunities.

There is uncertainty within the coach market surrounding effects following COVID-19. There has been signs of recovery but there has not yet been a period of stability to assess the extent of this. Post COVID-19, operators are seeing a much changed market with a decline in commuter traffic and a rise in leisure travel. Also, the number of over 60s passengers are very far off their pre COVID-19 level, but the rise of the under 22 passengers has helped outweigh this fall. Coach service operators seem to be more optimistic around the use of concessionary travel than local bus services, however the uncertainty around the reimbursement rate is a concern as this does not give them any long-term financial security as, if the reimbursement rate drops, they may have to cut routes if it becomes unaffordable to run some of their current services.

The buoyancy of the coach market is a source of optimism for operators, with this being shown from two new entrants to the market with Ember and Flixbus. This will hopefully help to generate new coach passengers and stimulate growth, although there are risks around potential aggressive price competition that may threaten the revenue of coach operators.

Community Transport

Community transport services that operate in the region face funding, competition, and changing travel trends which they need to cater for.

Mapping the areas where community transport runs is very difficult as its complex to show the extent of the operators' routes and their fleet size, although the community transport map of Scotland can give an idea of where services run. [46]

There has not been any cost of living increases to grants for community transport over the last 20 years, while the same services are being run and operators are trying to provide real wage wages for paid staff.

There is a sense from community transport operators that they are seen as a 'magic bullet' by local authorities and bus operators when their budgets are stretched. Instead of being used as a last resort, having a long term partnership with the right level of engagement, along with an investment of time and resources, is key for effective community transport.

Key Insight: There was a strong level of agreement across the different stakeholder groups that declining passenger numbers, lack of and uncertainty around funding (revenue and capital), and the impacts of the pandemic were the main areas of concern.

Current delivery model and funding: overview

Legislative Context

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

Bus services were deregulated across the UK in 1986 by the Transport Act of 1985. Amongst sweeping changes to how bus services were delivered, **this Act required that municipal bus operations be run as arms-length commercial companies rather than as public service departments**. All existing bus operators, including municipally and nationally controlled bus companies, thus became open to competition from private operators, provided they could satisfy basic operational and safety requirements and obtain an operating licence.

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

In England, the Transport Act 2000 was founded upon an ambitious Government vision for buses and made legislative provision for various kinds of partnership working between bus operators and local authorities that would

[46] Community Transport Map of Scotland – Google My Maps

realise that ambition. It was broadly replicated in Scotland though the Transport (Scotland) Act 2001. Formal voluntary partnership arrangements were permitted, subject to competition law considerations, and statutory quality partnerships were also permitted that could be used to restrict the use of various facilities (an interchange, a bus lane, a busway) to operators whose operations met defined quality standards. Statutory partnerships have been established in the SEStran region using this legislation, including the, Forth Valley Bus Alliance (FVBA) and Fife Bus Partnership.

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

The Transport (Scotland) Act 2019 (which received Royal Assent on 15th November 2019) enacted significant revisions to the 1985 and 2001 Acts, broadly in line with similar changes to English legislation on buses. The ability to create a voluntary partnership agreement remained, and statutory quality partnership arrangements were replaced by a Bus Service Improvement Partnership (BSIP), which would place firm commitments to improve bus services and infrastructure on a legal footing. The quality contracts process was replaced by a revised Bus Franchising Scheme and for the first time since the 1985 Act, local transport authorities in Scotland were permitted to establish their own new municipally owned bus operator to compete for supported bus service contracts let by local authorities. The West Lothian and Midlothian Bus Alliances, in the SEStran region, and the Tayside Bus Alliance (covering a key link between North East Fife, Dundee and onwards) in the Tactran region, were also set to be formed as BSIPs under the Bus Partnership Fund, but given the current uncertainty around this funding, the establishment of the alliances is uncertain.

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

Key Insight: The Transport (Scotland) Act 2019 offers a range of partnership options on a voluntary and statutory basis, as well as options for local transport authorities to take greater control of bus service operations through a creating franchising scheme and/or establishing a municipally owned bus operation, of which there is already one in South East Scotland (Lothian Buses).

Roles and Responsibilities

There are a range of differing roles and responsibilities surrounding the delivery of services in South East Scotland, with organisations having various roles and powers in relation to bus services and networks (summarised in Figure 76).

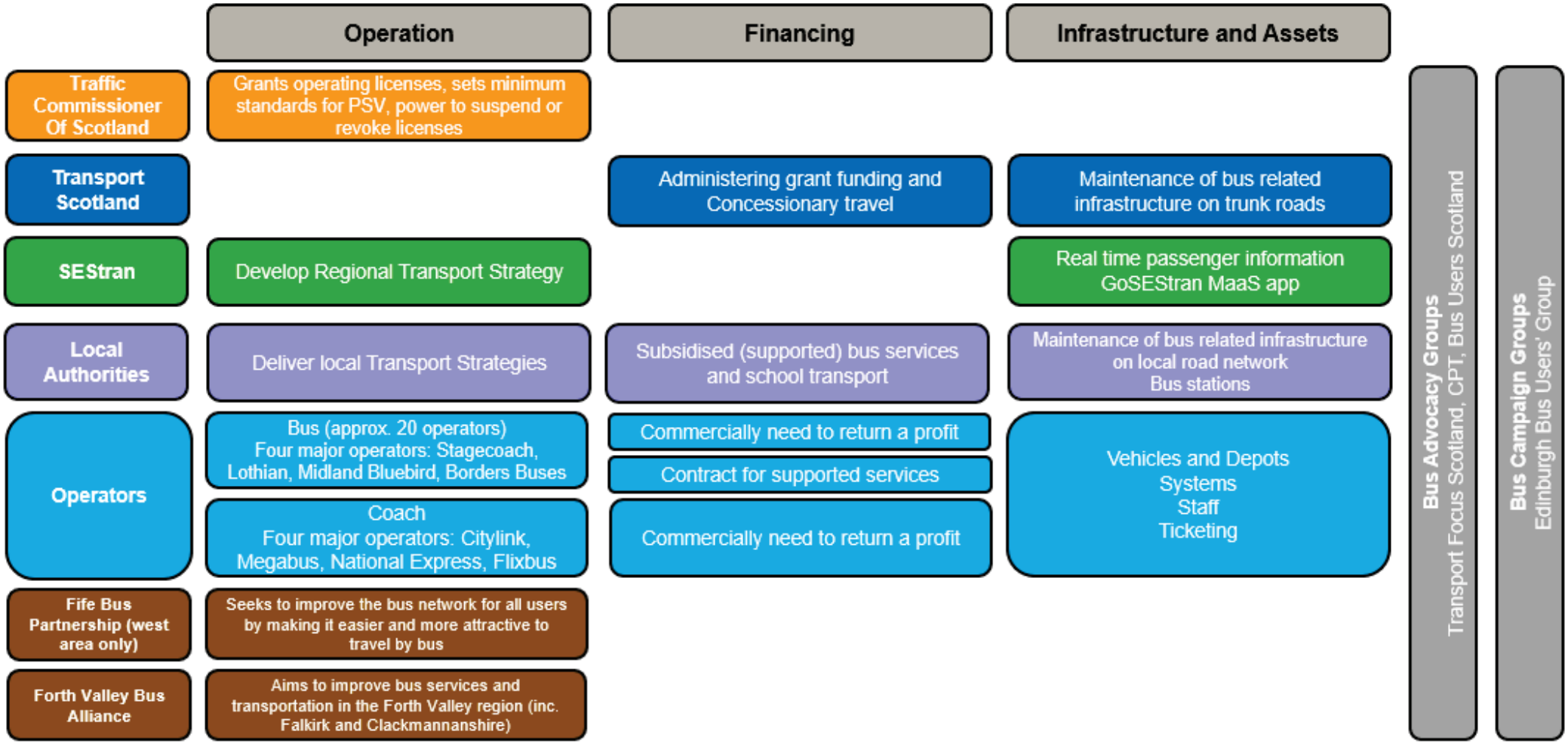


Figure 76: Bus operation and delivery in South East Scotland: roles and responsibilities

The network is ultimately governed by the **Traffic Commissioner** who grants operating licenses and with whom all services must be registered. In conjunction with the Driver and Vehicle Standards Agency (DVSA), the Commissioner also enforces minimum vehicle standards and they have the power to restrict, suspend or revoke operator licences if terms are broken. Their ability to restrict registered services is extremely limited provided that they meet certain (very limited) minimum standards, although they would have an enhanced role helping to enforce BSIP conditions.

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

As the regional transport partnership, **SEStran** is responsible for the development of the Regional Transport Strategy, which provides the direction for transport and addresses the transport problems and issues in the SEStran region. SEStran also develops active travel and public transport programs to make journeys by these modes easier and assists the local authorities in developing transport schemes in their region.

The eight **local authorities** in SEStran region prepare and deliver Local Transport Strategies, and as the local roads authorities are responsible for the implementation and maintenance of the local road network, including any bus priority infrastructure. The local authorities do not have the powers to govern bus operations across their areas and cannot prevent the curtailment or removal of services, although they must be consulted by bus operators as part of the service registration process. Socially necessary bus services are provided through tendered contracts run by the local authorities.

As discussed above, there are around **20 bus operators** across the region, with four major service providers: Lothian Buses, Borders Buses, Stagecoach, and Midland Bluebird each with a strong foothold in certain geographical areas, and between them operating over 88% of all bus vehicle kilometres across the region. Operators are under no obligation to run specific routes or services beyond those they have chosen to register with the Traffic Commissioner, and can provide services anywhere. Once registered, operators can alter, reduce or indeed implement new services, but there is a requirement for this to be done in consultation with the local transport authority(s) impacted. Operators may also bid to run subsidised services contracted by local authorities. There are a further **four core coach service operators** who provide longer distance inter-urban services within and to and from the region. Again, such operators are under no obligation to run specific routes or services and can design and operate their own network provided services are registered with the Traffic Commissioner (where this is necessary).

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

Key Insight: At present, only bus and coach operators can plan and design their respective bus networks. Local authorities are the last resort in ensuring additional services where the commercial network is not meeting the needs of communities. The public sector more widely has a role in providing the policy and physical infrastructure to support a thriving bus network,

Financial Context

The majority of bus services in the region are provided on a commercial basis by bus companies who recover the cost of operating their services through a mixture of farebox revenues and a range of government support. A minority of service kms are operated on behalf of local authorities as socially-necessary services which cannot be provided commercially and are therefore subsidised to make up the revenue shortfall. Most bus companies are privately-owned, apart from Lothian Buses and its subsidiaries which is owned by a consortium of local authorities (see below).

By way of context, at the Scotland level, **total government 'support' in 2022/23 made up 63% of total operator income**, up from 49% pre-pandemic. Of that 63%, 11% came from local authority support for socially-necessary services, 57% came from concessionary fares reimbursement and 32% from Network Support Grants. So, in that year, approaching two-thirds of operator income came via central or local government. Socially necessary services which are provided through tendered contracts let by the local authorities are funded from a number of different sources such as identified revenue funding and developer contributions.

Unlike the other operators in the region, **Lothian Buses** operates as a municipally owned bus company in a unique way, and this is outlined here. It is the largest municipally bus company in the United Kingdom, with the City of Edinburgh Council owning 91% of the company through Transport for Edinburgh. The remaining ownership is divided among Midlothian Council (5%), East Lothian Council (3%), and West Lothian Council (1%). After 1986, the previously council run Lothian Regional Transport became Lothian Regional Transport plc under the ownership of the then Lothian Regional Council, which was then abolished in 1996. Privatisation of LRT was promoted by some

and opposed by others and in the end, ownership was passed to the constituent councils before being rebranded as Lothian Buses in 2000.

Lothian Buses has different operating models across the areas they serve. These models provide flexibility to understand the product and how the buses run in the areas they serve. Edinburgh is unique in the region in terms demographics, economic, tourism and cultural opportunities.

Lothian Buses also owns the subsidiary companies of Lothian Country, East Coast Buses, Edinburgh Bus Tours and Lothian Motorcoaches. Lothian Country provides 11 services for the regions of Queensferry and West Lothian. East Coast Buses operates nine services to and from Edinburgh. Lothian Buses recorded 110 million passengers in 2023, an increase of over 17% from the previous year. In 2023, the bus company operated 26.7 million miles, recruited and trained 413 drivers, and has over 300,000 downloads of Lothian's journey planner app.

In 2020 all buses in the fleet were made Euro6 emission standard, and in 2023 the 'Driving towards Net Zero' plan was released which aims to deliver a transition from diesel to zero emission vehicles and infrastructure. This involves the Central depot to be electrified by 2029, with Longstone and Livingston depots also to become electrified in 2031. In 2035 Lothian Buses aims to have a full fleet of Net Zero emission vehicles.

Lothian Buses currently operates in much the same was as any other commercial operator with the same commercial pressures. However, its municipally owned status allows its shareholders, which are the local authorities, to choose to reinvest profits back into the service, ensuring continuous improvement and thus take a longer-term view of the development of the public transport network to benefit the residents and visitors of Edinburgh and the Lothians in the form of a 'social dividend'.

Key Insight: Lothian Buses operates as commercial operator but as a municipally owned company allows its shareholders, the local authorities, to choose to reinvest profits back into the service and the bus network. Therefore, profits made by the company remain in the public sector and can be reinvested in the form of a 'social dividend'.

The funding requirement for local authorities in SEStran to **contract subsidised services** is significant given current funding levels for local authorities. In 2022-23 local authorities in the region spent £13 million on annual bus subsidy for tendered mileage. Below the levels of annual subsidy for each local authority is described where data has been made available.

- Falkirk Council continues to subsidise bus services to ensure that certain routes remain operational, i.e., those that are not commercially viable but are essential for community connectivity. As of the latest updates, the Council spends around **£1.4 million** to maintain these services.[47] This expenditure is in response to a **21% increase** in costs compared to previous years. To manage these increased costs and maintain a sustainable budget, some early morning, evening, and Sunday services with low usage have been reduced.
- Fife Council subsidises around **10%** of the bus network, mainly covering services in the evening, weekends, and more rural areas.[48] In 2022/23 the Council allocated an additional **£700,000**, so Fife currently provides **£5.5 million** in annual bus subsidies. These subsidised routes carried **2.3 million passengers** in 2019.
- Scottish Borders Council allocates a significant annual subsidy to ensure sustainable bus services across the region. In 2023, the Council continued to subsidise over **80%** of the local bus network, with around **£1.6 million** being spent on bus services.[49] This funding also supports demand-responsive transport services for residents in rural areas and contributes to the maintenance of over 3,000 km of the road network across the Scottish Borders.
- In West Lothian, the Council subsidises **20%** of the local bus network.[50] West Lothian Council has a **c£1.9 million** budget to support socially necessary services in the authority. These services are operated by Lothian Country following a competitive tendering process and are part funded through contributions received from housing developers.
- In East Lothian, the council has had a **c£1 million** budget from 2020 to support socially necessary services in the authority. East Lothian is committed to providing a reliable, cost-effective, and sustainable bus service to encourage residents to opt for public transport over personal vehicles.

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47 News - Reduction of bus service comes into effect Monday, 15 August | Falkirk Council

48 Bus travel and public transport | Fife Council

49 https://scottishborders.moderngov.co.uk/documents/s80162/Item%20No.%207%20-%20Bus%20Network%20Review%20Report%20-%20Council%20-%2025%20January%202024.pdf

50 Local Bus Services Information - West Lothian Council

- Clackmannanshire supports a number of bus services and routes provided by various operators, and it undertakes the assessment of need for subsidised public transport and additional support services. The council have had **£165,000** budget from 2020 to support socially necessary services in the authority.
- City of Edinburgh subsidises bus services to ensure that certain routes remain operational, where not commercially viable. In 2023, the Council spent **£1.4 million** on bus services – a relatively small number compared to the other authorities which have lower population levels.
- 2022/23 Local Financial Returns data for Midlothian suggest that the council does not provide annual subsidy for bus services.

While the costs have risen due to the increasing supported services coverage, the increasing costs also represent the rising operational, and hence contract, costs of service provision i.e., there has been an increasing cost to support the network even outwith the provision of additional supported services.

SEStran's £13m annual bus subsidy is significantly higher than the amount spent on keeping socially necessary services running than other regions in the UK. For example, the West Yorkshire Combined Authority and the West of England Combined Authority spend £3.8m and £4m respectively.[51,52] Although spend is lower than the West Midlands Combined Authority (£16.3m).[53] A direct comparison of these figures can be misleading as the level of subsidy depends on a range of factors such as the rurality of the region as buses will need to travel further to more isolated areas, budgets of the local authorities, and populations.

Key Insight: The subsidy for services of £13 million in the SEStran region is significant given current pressures on funding for local authority budgets overall.

Grants

The financial grants that are, or were, available to support bus services in Scotland fall into three distinct time periods: prior to COVID-19, during and immediately following the pandemic, and the period since the end of post-COVID-19 transitional arrangements and going forward (as shown in Figure 77).

[51] Transport leaders approve £3.8 million for protecting and restoring bus services across West Yorkshire - West Yorkshire Combined Authority (westyorks-ca.gov.uk)
[52] Bus services Transport Levy.pdf (moderngov.co.uk)
[53] Bus services saved despite unprecedented national cost pressures (wmca.org.uk)

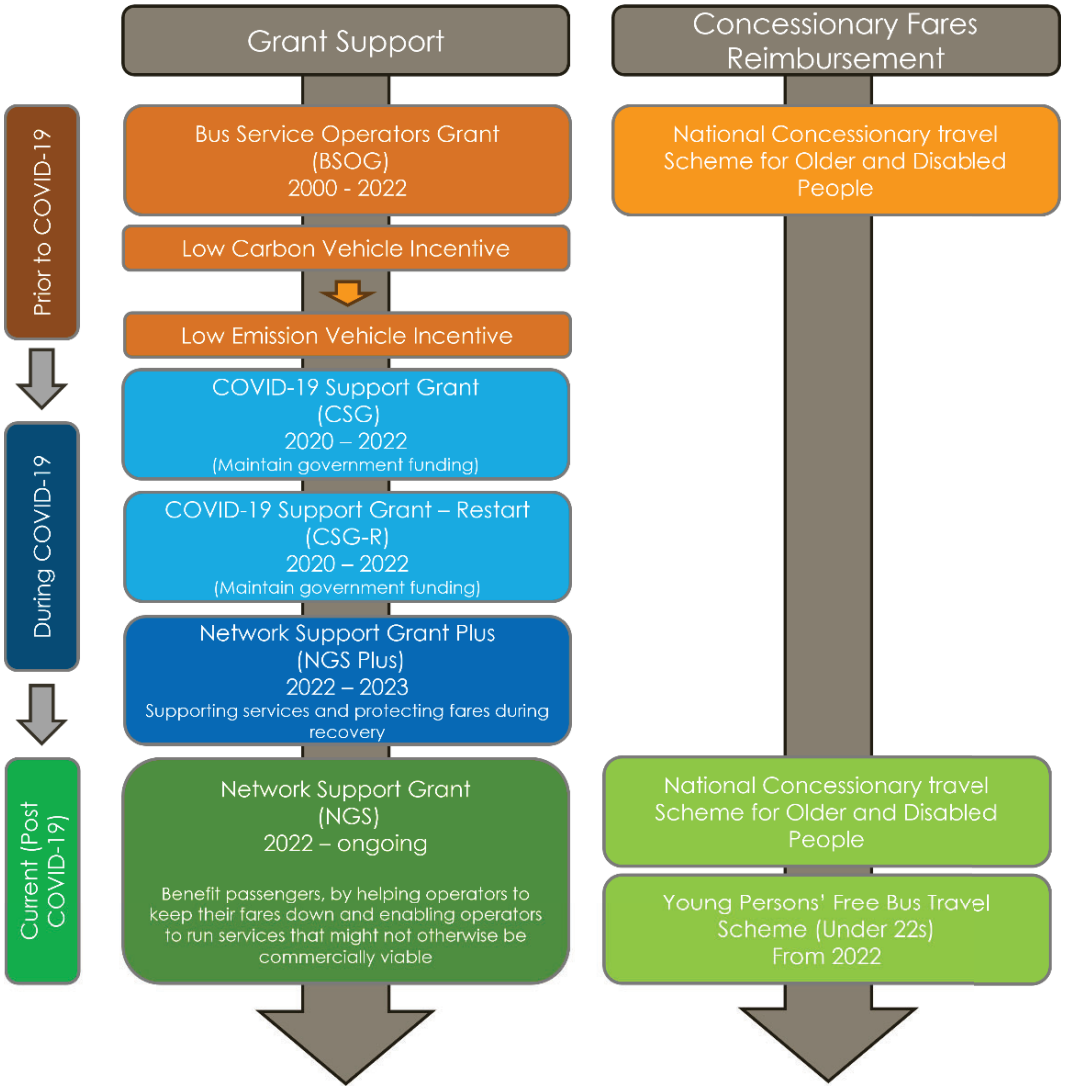

Figure 77: Grant support and concessionary fares reimbursement

Prior to COVID-19

From 2000 to 2022, the Bus Service Operators Grant[54] (BSOG) was the principal form of support for local bus services. Introduced in the Transport Act 2000, it replaced Fuel Duty Rebate and initially operated in a similar way, giving a per litre rebate on the duty levied on fuel used by operators of eligible local bus services. BSOG was devolved in 2010 when Transport Scotland assumed responsibility for administration on behalf of Scottish Ministers. From this time, the formal link to fuel duty was removed and, instead, payment calculations were based upon the numbers of live service kilometres run per bus.

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

The National Concessionary Travel Scheme for Older and Disabled People (ODPS)[55] was introduced in April 2006 and provides free bus travel throughout Scotland for holders of an NEC who are aged 60 or over or are disabled. Transport Scotland compensates bus operators for the revenue foregone on the basis that they should be financially 'no better off and no worse off' because of their participation in the scheme. Reimbursement is calculated by applying a national rate to the adult cash single fare that would have been paid for individual concessionary journeys.

[54] Information on the Bus Services Operators' Grant (transport.gov.scot)
[55] With eligibility including for Young Persons (Under 22) Under 22s free bus travel | Transport Scotland and those aged 60 and over and disabled people Eligibility and Conditions for the 60+ or Disabled Traveller (transport.gov.scot)

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

During and Post Pandemic

New funding streams were introduced by Transport Scotland to support bus operators during the pandemic, consisting of a *COVID-19 Support Grant* (CSG) which sought to maintain government funding and *COVID-19 Support Grant – Restart* (CSG-R)[56] which compensated operators for the loss of fare paying passenger income and the impact of higher input costs.

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

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

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

Current Funding

The Network Support Grant (NSG)[57] has been in place since 1 April 2022, and is a discretionary grant paid under Section 38 of the Transport (Scotland) Act 2001 by Transport Scotland on behalf of Scottish Ministers.

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

The aim of the NSG is principally to benefit passengers, by helping operators to keep their fares down and enabling operators to run services that might not otherwise be commercially viable, thus contributing to the maintenance of the overall bus network. It also contributes to the operation of Community Transport services, allowing people who cannot make use of conventional bus services to access local services. There is no allowance for low emission buses, other than honouring remaining BSOG LCV or BSOG LEV entitlement.

The National Concessionary Travel Scheme for Older and Disabled People continues in operation as pre-pandemic with a national reimbursement rate currently at around 56%. The Young Persons' Free Bus Travel Scheme[58] ('under 22s') was introduced in January 2022 and provides free bus travel throughout Scotland at any time of the day for holders of a NEC or Young Scot NEC who are aged between 5 and 21 inclusive. Transport Scotland compensates bus operators in a similar way to the ODPS, with reimbursement rates currently (as of September 2023) at 43.6% of the adult single fare for journeys made by under 16s and 81.2% for journeys made by 16- 21 year olds.

As part of the Scottish Government's 2024/25 budget, they announced that their planned £500m 'Bus Partnership Fund' was paused and it is not known whether this will be restarted at the time of writing. This was originally announced as a response to the climate emergency and included bus priority infrastructure with the aim of reducing congestion on services to improve journey times and reliability. This would have contributed significantly to Scotland's buses in their aims to improve quality of services and to recover patronage to pre-pandemic levels.

The funding picture (in real terms) since 2006-07 is shown in the figure below split by:

- Local Authority Grant Support - Total of all local authorities' gross costs incurred in support of bus services, either directly or by subsidies to operators or individuals
- Concessionary fares – Figures refer to Transport Scotland spending on elderly, disabled and youth schemes

[56] COVID-19 Support Grant | Transport Scotland
[57] Network Support Grant | Transport Scotland
[58] Under 22s free bus travel | Transport Scotland

- Network Support Grant - Network Support Grant (previously Bus Service Operators Grant) is a subsidy provided by Central Government to operators of local bus services
- Revenue from passengers

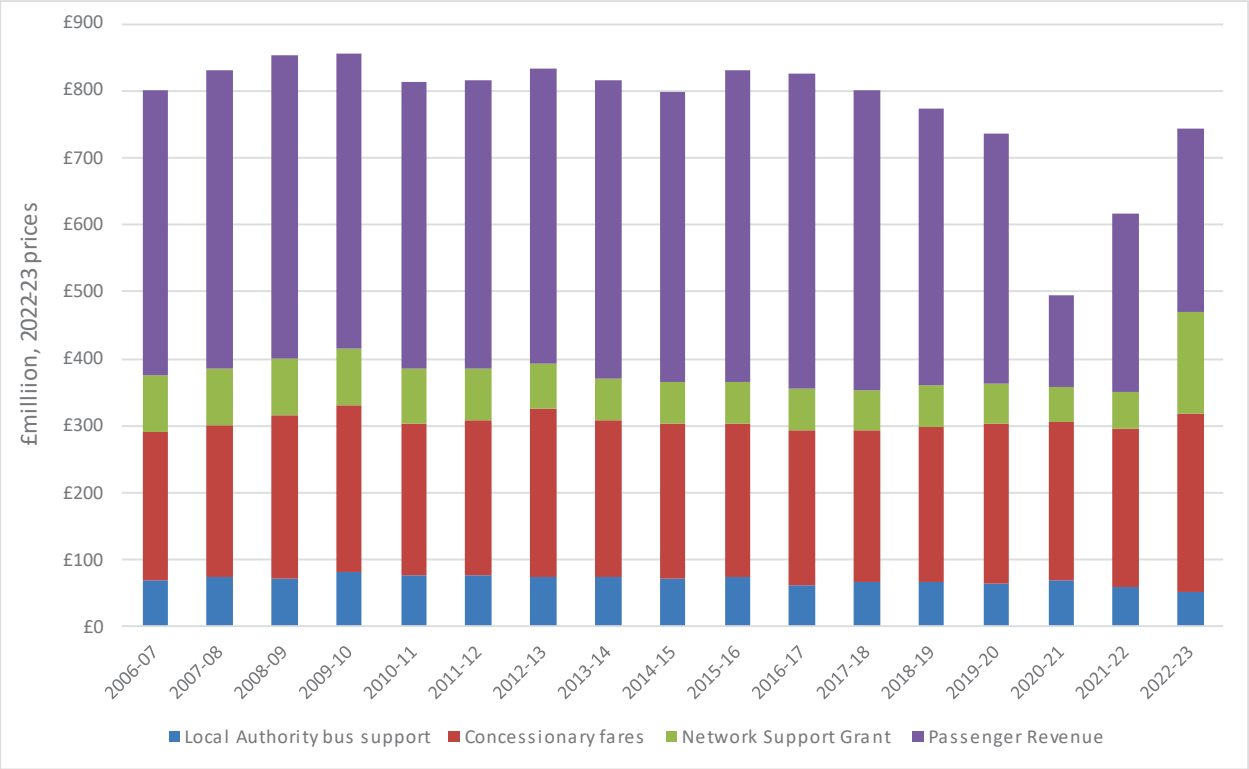

Figure 78: Government support on local bus services (Scottish Transport Statistics)

This shows how in real terms, the totality of government 'support' to bus services (blue, red and green colours) was broadly unchanged in the decade before, and indeed through the pandemic. NSG+ and spending on under 22s concessionary fares has caused a substantial jump in 2022-23. **However, by 2022-23 local authority spending on supported services had dropped by 36% from its peak in 2009-10**. This will be having a sustained impact on the degree to which councils can retain supported services, particularly in the light of increases tender prices.

Comparison with Other Modes

Scottish Government spend on transport by mode was reported in the context of the Fair Fares review. Figure 9 from the Economy and Budget Context Supporting Paper[59] is shown below.

59 https://www.transport.gov.scot/publication/public-transport-system-analysis-supporting-paper-one-fair-fares-review/economy-and-budget-context/

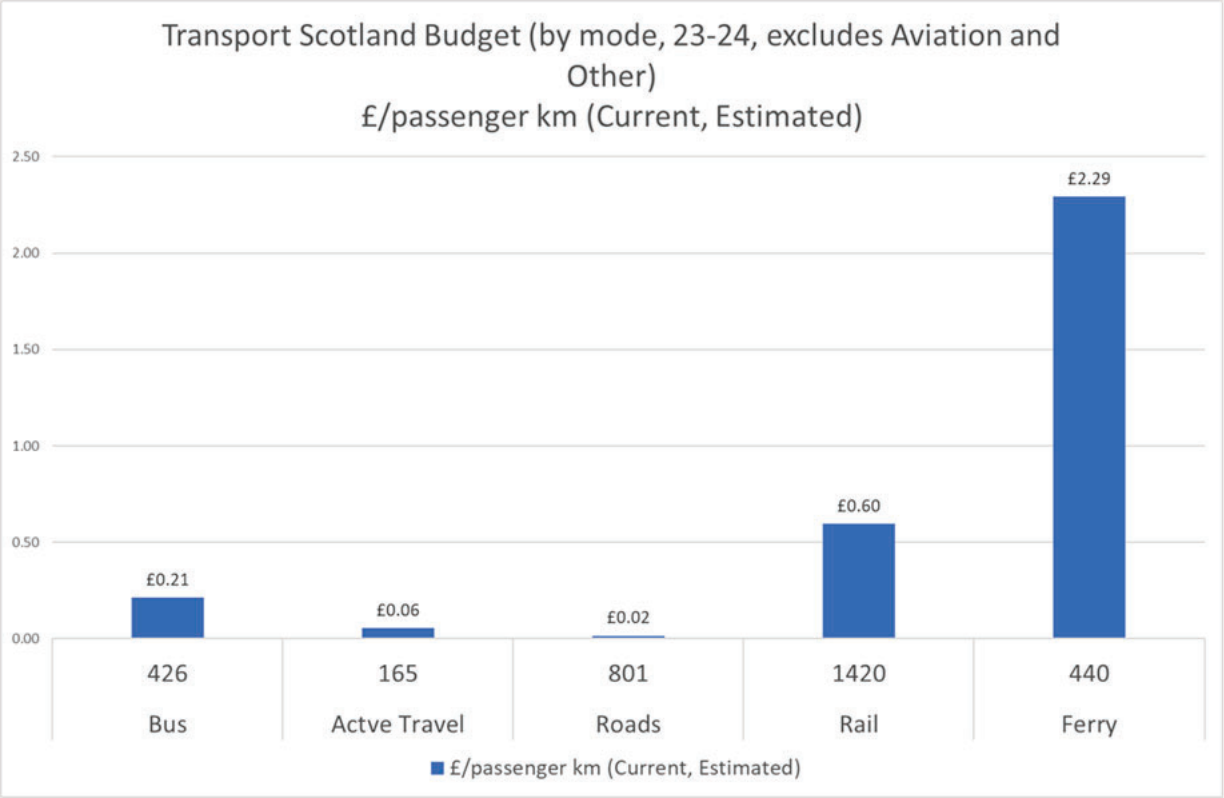

Figure 9 - Transport Scotland Budget by mode passenger km

Figure 79 Transport Scotland Spend by Mode

On a 'per passenger km' basis, spend by Transport Scotland on rail is therefore around three times that of rail. As rail trips are on average longer than bus trips, on a per trip basis, spend on rail would be higher still. In absolute terms, as reported in Scottish Transport Statistics[60] under 'Central Government Support to Transport Industries', spend on rail in 2022-23 was £1,199m and spend on bus was £412m so despite bus carrying almost four times as many passengers, government 'support' to the rail sector was well over than double that of the bus sector.

Key Insight: Scottish Government has made further commitment to support the under 22 free bus travel scheme, but the pausing of the BPF is a significant negative signal and risk for the industry. 2022-23 saw a significant increase in government spending to support local bus services. Local Authority spending on supported services has however dropped sharply in the last 15 years. The amount spent by Transport Scotland on rail services is almost three times the amount it spends on bus services, despite bus carrying almost four times as many passengers.

[60] Scottish Transport Statistics 2023, Table 10.1

PART 5: SUMMARY OF PROBLEMS AND OPPORTUNITIES, ISSUES AND CONSTRAINTS

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. [61]
- 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%.[62]
- 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). [63] 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.** [64] Again, this measure **varies widely across the region** 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

There are a range of characteristics of the region's bus network that contribute to the decline in passenger numbers – these supply side problems are highlighted below:

- 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**. In 2022-23 , £13m was spent on bus subsidies for tendered mileage in the region. This changes significantly depending on the local authority, with Fiife Council providing £5.5m in bus subsidies, whereas Midlothian does not provide any annual subsidy for its buses. 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**.
- 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.

[61] Scottish Transport Statistics 2023 | Transport Scotland
[62] SEStran-2035-Regional-Transport-Strategy.pdf
[63] Transport and Travel in Scotland 2022 | Transport Scotland (Travel Diary Tables, TD2e)
[64] statistics.gov.scot

- 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 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.[65] 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 affects 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 general, which affects the price and attractiveness of bus services, particularly on longer bus trips, leading in turn to lower passenger numbers.[66]
- Providing bus services with the appropriate level of infrastructure is vital for reducing the impacts of congestion. Implementing bus priority infrastructure will enable greater journey time reliability and bus punctuality and is therefore a key driver of change in making buses cheaper to run and more attractive for passengers to use. Priority infrastructure is particularly important around congested urban areas.
- 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.[67] 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.[68] The proportion of all bus passengers using concessionary fares has jumped sharply in Scotland to almost 50% with

[65] Analysed using Google API data
[66] SEStran-Main-Issues-Report.pdf
[67] SEStran-2035-Regional-Transport-Strategy.pdf
[68] Chapter 2: Bus and Coach Travel | Transport Scotland

the introduction of the under 22s scheme, with City of Edinburgh having the highest uptake in Scotland (83%). 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. This is shown with Fife and Clackmannanshire having the lowest uptake in Scotland (41%), showing the significant level of variation in the region.[69] The absolute level of fares (and fare-capping) also varies widely across the region bringing a further inequality.

- Concessionary fares are also offered to those who are aged 60+, visually impaired (and companion), and disabled (and companion). The City of Edinburgh and Fife have the largest number of concessionary fares issued of the eight local authorities in the region. The SEStran region has the highest proportion out of the Scottish regions using the concessionary 60+ card (90%), with 11% of those holders using it two or three times per week.
- **Ticketing** options can be complex across the region[70] 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 SEStran region is projected to see significant **population growth**.[71] 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.[72,73,74] 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.[75] A significant shift from car to bus will be 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. To achieve this target, the City of Edinburgh introduced a Low Emission Zone (LEZ) as a way to reduce the harmful emissions from road traffic and increasing the use of sustainable transport methods.[76]
- 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.[77]

[69] Chapter 2 - Bus and coach travel | Transport Scotland
[70] SEStran-Main-Issues-Report.pdf
[71] SEStran-2035-Regional-Transport-Strategy.pdf
[72] Heartlands Development - Invest in West Lothian
[73] Blindwells - A flagship residential site located in East Lothian
[74] West Town Edinburgh (west-town-edinburgh.com)
[75] Targets for a sustainable transport future – The City of Edinburgh Council
[76] Background to the Low Emission Zone – The City of Edinburgh Council
[77] Transport (Scotland) Act 2019 (legislation.gov.uk)

- 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.[78]
- 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.
- **Community Transport** and **Demand Responsive Transport (DRT)** flexi services provide the region with opportunities to address transport problems for those who are isolated or unable to use mainstream public transport. These services can also provide flexible alternatives to fixed bus services.
- **Other research into the regions transport network** such as Fife's Local Transport Strategy 2023-2033 and the ongoing Fife Bus Network Review will provide further insight into the current trends and regional issues in South East Scotland and will contribute towards future improvements in the bus network.
- **Strathclyde Partnership for Transport** have released their own Regional Bus Strategy Case for Change. Many of the same problems and opportunities aligning across the different Regional Transport Partnerships, this strengthens the argument of the shared reality that Scottish bus services need greater long-term support.

Constraints

- 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.[79] 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 amount spent by **Transport Scotland** on rail is almost three times the amount it spends on bus services, despite buses carrying almost four times as many passengers.
- 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.[80] 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.
- Simple and easy to use multi-operator **ticketing** is insufficient across the SEStran region and is a common complaint from bus passengers that needs to be addressed.
- 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.

[78] Executive summary | Transport Scotland
[79] Bus Partnership Fund | Transport Scotland
[80] Getting Scotland walking, wheeling and cycling | Transport Scotland

PART 6: 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.[81] The analysis as set out in this 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.[82] 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

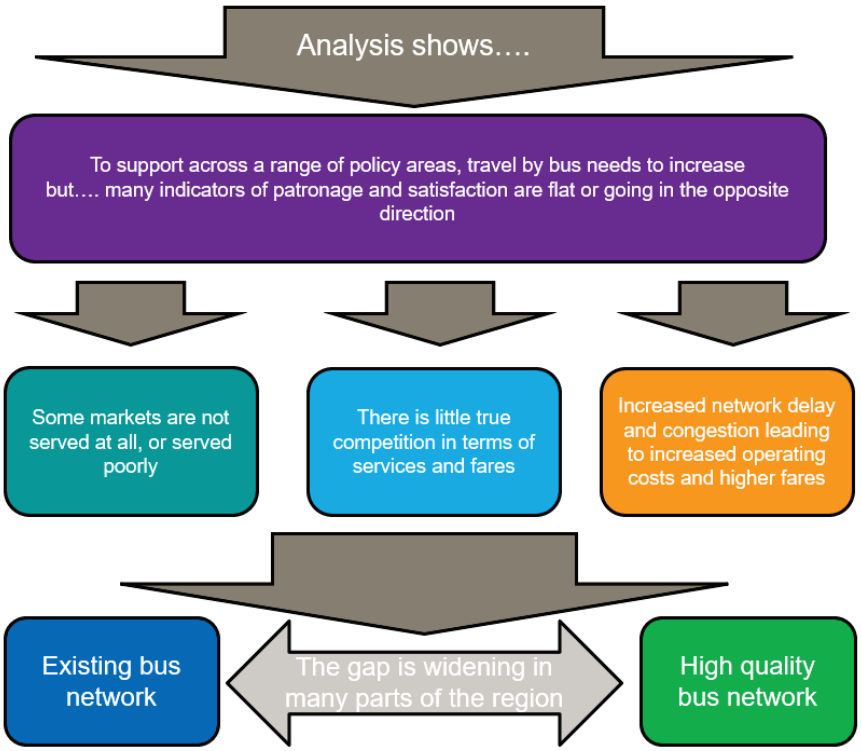

Figure 80: Widening gap between existing and high quality bus service

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. These factors are increasing the widening gap between the existing bus network and the vision for a high-quality network as set out in the RTS, and as shown in Figure 80.

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

[81] SEStran-2035-Regional-Transport-Strategy.pdf
[82] Scottish Transport Statistics 2023 | Transport Scotland (STS Chapter 02, Table 2.2b)

- 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, affordable, accessible and available 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 as shown below, which in turn support the fundamental transport outcome for the strategy – **to increase bus passenger numbers.** This key aim gives rise to three Strategy Objectives as shown opposite, and meeting these objectives will result in the fundamental transport outcomes for the strategy – to get more people to choose travel by bus and that more people can use the bus to meet their everyday travel needs.

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:

(iv) 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.

(v) 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

(vi) 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

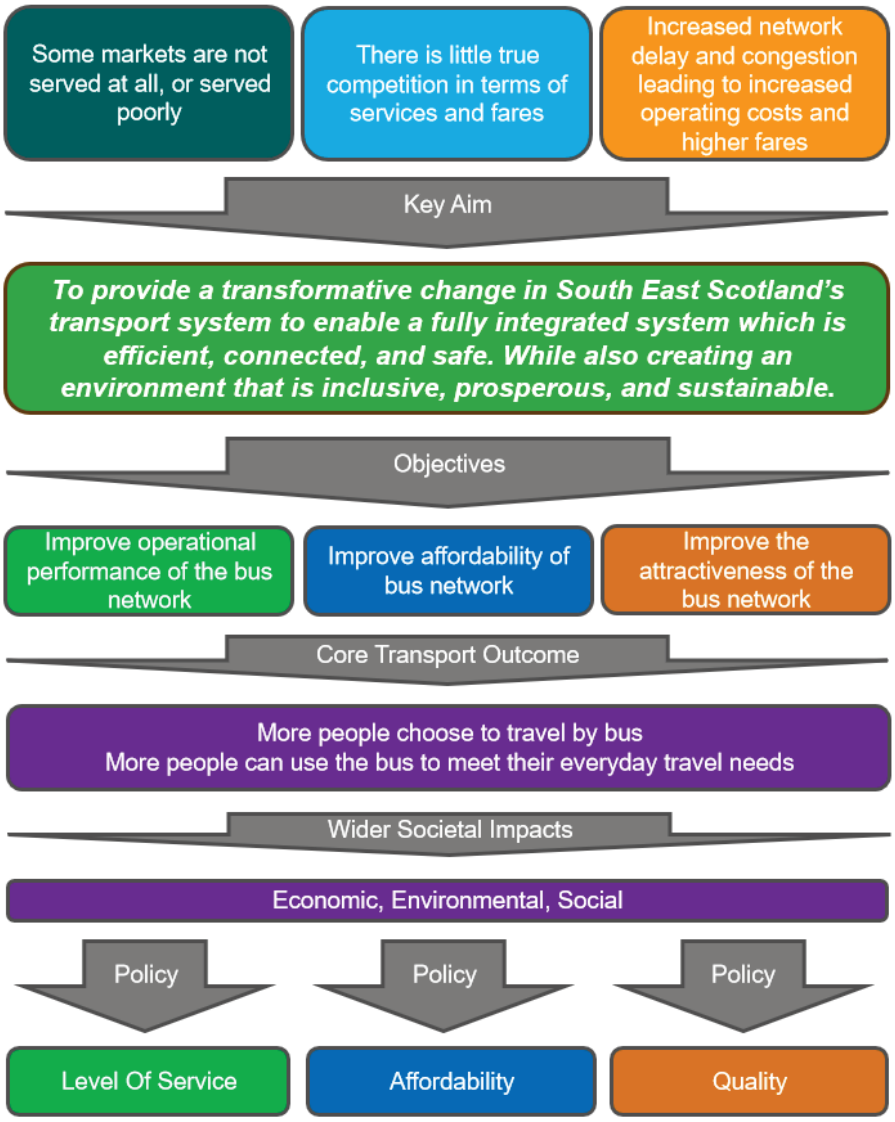

Figure 81: Problems to Policies

This Case for Change will closely align with the Strathclyde Partnership with Transport Regional Bus Strategy Case for Change as they will inevitably include many of the same problems and opportunities that are facing Scotland's bus network. Together these reports will help to deliver a strong argument around how valuable the bus networks are to the Scottish people and how significant support is needed for them to help deliver a range of policy goals.

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.

GO SESTran

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