



The future of mobility

*If the bus is to play a leading role in the long term future of urban mobility, we need to be **scanning the horizon now and sowing seeds of change** to ensure that a very different bus world stakes its claim to exist.*

*We shouldn't be spending time and energy implementing a retro 1980's governance model for yesterday's buses but be focused on **designing a new age of the bus looking toward 2030 and beyond.***

*This is the **eighth** of fourteen weekly articles on what different aspects of that new bus future could look like and the kind of things we need to be sowing seeds for now if we are to truly **ride the wave of future opportunity.***

*We need to **be bold if we are to shine** over the next 40 years and do more than invest in a zero emission fleet, tinker with governance and introduce the odd capped fare.*

Episode Eight – People

The defining characteristic of the bus industry is that it is **people intensive**.

It is, effectively, much **more about people than it is about buses**.

As at today, all but a dozen or so of the registered local service buses operating across the UK require a driver leading to over **90,000 being required to deliver the UK wide network**.

Operating buses is an unavoidably **labour intensive** business.

In total, over **3 billion individual journeys are made by customers** each year so it is also a **customer intensive** business.

The **Future of Mobility** has a **huge people component**.

Drivers

If we successfully transition to an **Active Travel and Mass Transit First** environment in our towns and cities, the driver workforce, ignoring, for now, any autonomous component, will **require around 700,000 drivers in 25 years time**. Spread evenly from now, that implies **increasing the driver workforce, alone, cumulatively by an additional 25,000 per annum** in an industry which has **habitually operated almost hand to mouth for drivers** with an annual staff turnover of around 15%.

That issue, alone, is a **huge logistical, cultural and political challenge**.

As with many other aspects of delivering a transformed urban travel environment in line with achieving **Net Zero**, **procrastination in addressing this issue would not be the smartest move**.

The driver role will also change character as fare collection and ticket validation move away from the driver to allow **greater focus on the core activity of driving a zero emission fleet swiftly and smoothly on streets free of congestion and traffic**.

That change may, of itself, make the **driver role less stressful and more attractive**.

We do, however, need to **identify where that much bigger labour force will come from**.

Is there **sufficient latent demand in the current UK workforce to meet what is required** without creating a labour shortage in a parallel market or should we accept that a proportion of that growing workforce will inevitably need to be met through immigration?

Given the **current 'culture war' over immigration** in the political field, that matter needs to be debated and resolved upfront.

It is also important that the driver role is accorded the professional status it deserves and the workforce reflects the diversity of the population it serves with a **significant growth in the proportion of young, female and ethnically diverse drivers**.

The **relevance of autonomous vehicles will become more apparent as time passes** and the technology's practical application is better understood but there will still be an 'on street' labour requirement for additional supervisors and customer service personnel on the autonomous services even if that equates to less than one member of staff per bus.

Driver recruitment has long been the **Achilles Heel of bus operation with endemic driver shortage plaguing the industry since the 1950's** leading to a work culture of long hours and overtime simply to survive. That **long hours and overtime culture was never ever healthy** but will be even less acceptable in an *Active Travel and Mass Transit First* environment in the 2050's.

The only way an *Active Travel and Mass Transit First* approach will work is with an **abundance of highly professional, well motivated and well rewarded drivers.**

A **long term sustainable solution** to that issue is **an imperative component of the bus renaissance of the next 25 years.**

Supervisors and Customer Service Personnel

Even if nothing else changes, the **substantially bigger driver workforce will lead to at least a proportionate increase in the number of Supervisors required.**

However, as is clear from **Episodes Two** and **Seven**, delivering the quality and standard of service required will lead to **increased 'on street' supervision** ensuring the highest possible quality of service delivery and customer service.

On street Supervisors will also be supplemented by **more Customer Service Personnel** assisting customers, both on street and through physical retail outlets, in all towns and cities.

Again, the question needs to be asked as to **whether that inflated workforce can be sourced internally from the UK** or whether a proportion is met through immigration.

As with drivers, the Supervisors and Customer Service Personnel should have a **diverse background matching that of the customer base.**

Fleet Maintenance and Servicing Personnel

There will be **three issues impacting upon Fleet Maintenance and Servicing Personnel over the next three decades.**

Firstly, the **conversion of local bus fleets to zero emission**, powered by batteries or hydrogen fuel cells.

This will **radically simplify fleet maintenance** and **change the nature of the skills required** by staff.

Secondly, the gradual **introduction of autonomous technology**. Whilst there are limits to the relevance of autonomous operation in local bus services, other than where fully restricted alignments can be provided, there remains the option to **radically restructure internal depot processes of recharging, cleaning and parking to be carried out autonomously** reducing staff costs and expanding the capacity of depot sites through allowing buses to be parked more densely.

Overall, the **workforce is likely to increase materially** which, again, raises the issue of whether a big enough labour market exists in the UK or whether immigration will be required.

Management of Operational Businesses

The design and delivery of bus services is **highly sensitive to the demographics and physical geography** of individual towns and cities. **There is no 'one size fits all' template business model.**

Consequently, bus businesses, by their very nature, need to be **designed and managed locally in close collaboration with the local transport authority** to deliver the best outcomes both for customers and the owners of the businesses.

The **much denser networks of more intensive services** will require **expansion of commercial network planning, scheduling and marketing teams** to optimise network design, pricing and promotion.

All the evidence points to **management remote from the operational front line** leading to **reduced customer satisfaction, poor relations with local transport authorities and less demand growth.**

Local operating company managers will find themselves **responsible for much bigger, higher revenue businesses which will demand new and enhanced management and networking skills** over time.

As much autonomy as possible needs to be devolved to the local operating environment to ensure that the **business stays fully integrated into the local community and economy** as it will play a far, far greater role in the community than now.

Major Bus Owning Groups

Where local bus operating businesses are part of a wider Group, the central overhead of those Groups should be as **lean as possible, focusing strictly on those areas where centralised Group activity can add true value** for shareholders, local and national stakeholders and customers.

Over centralization of operational activity should be avoided as it will impinge on the quality of service perceived locally from operating companies and damage the credibility of the **Active Travel and Mass Transit First** operating model essential to deliver mass modal shift from the car.

Belief and Leadership

One critical task for **all bus industry leaders** will be to **steer a path toward the major modal shift required to deliver the UK Government's Net Zero obligations in conjunction with Government, both national and local.**

That will require both **belief and leadership.**

A long term bus renaissance based on **mass modal shift over the next three decades will not happen by accident.**

It will require **co-ordinated planning, lobbying and action across the UK bus industry at both national and local level for the long term over and above the short term 'business as usual'.**

Given the necessary battle to **win hearts and minds** to the cause of **Active Travel and Mass Transit First** in our towns and cities and the **scale of change necessary to sow the seeds of that change** ensuring that a very different bus world stakes its claim to exist **is not some distant future activity.**

It needs to begin now and requires the industry collectively and individually to equip itself with the management skills and resources to drive and deliver that change in conjunction with local authorities and national government.

It is clear from **Episodes One to Eight** that the path to **Active Travel and Mass Transit First** mobility, delivering on the UK Government's **Net Zero** obligations, will need a **long lead time, both to deliver hearts and minds to support it and then work progressively through the complex logistics involved.**

It will not happen overnight and, indeed, it **will not happen at all if we do not identify the people to lead that crusade from within the bus industry now!**

There is much to be done.

Conclusions

The path to delivering **Net Zero** through an **Active Travel and Mass Transit First** agenda will not only have **major implications for both the people who**

currently work in the bus industry and their customers but see both groups of people grow exponentially over the next 25 years and beyond.

That growth will have **major social and economic impacts which will need to be addressed upfront** if they are to flow through smoothly.

Next Week

It is very clear from everything discussed in **Episodes One to Eight** that **delivering a different future for the bus over the next 25 years will require substantial financial investment** and, next week, in **Episode Nine**, we will address the options for **Funding** that investment.