



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 **thirteenth** 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 Thirteen – Conclusions

The inspiration for this series of articles came from my being asked by a series of different investors in 2020 for **my opinion on the prospects for the bus industry.**

I said to them all that the **trading environment for bus businesses in the UK since 2010 had been particularly difficult** but the **medium to long term prognosis was much brighter** due to the **commitments made by Government on Climate Change** and the delivery of **Net Zero by 2050.**

It is well understood that, **to deliver that target, levels of car traffic**, whatever their power source, **WILL have to reduce dramatically** and the **only way that change can be reasonably and efficiently achieved is** through a combination of **Active Travel** by foot and bike and **Mass Transit** by bus, tram or train.

That approach is **proven in a number of towns and cities worldwide.**

Whilst that was a perfectly logical answer, I have more recently **begun to** look at particular UK towns and cities and **ask myself what the bus component of that transformation needs to look like, how it can be delivered and how long it will reasonably take - both practically and financially.**

Simultaneously, I thought through the **contribution required from local government in delivering a suitably restructured urban environment and national government to provide the right legislative environment.**

Whilst **this series of articles** is by no means a detailed blueprint, it **captures the key developments required** and confirms that, if we are **to meet the 2050 deadline, we need to be sowing the seeds of change now.**

A **summary of the critically important changes** is outlined below.

Network Development

There needs to be a **massive overhaul in bus network design, capacity and quality** to create **a credible alternative to the car.**

Current bus networks, including those proposed in 2024 Franchising Assessments, are **suboptimal** with the product **compromised by traffic congestion, inherent unreliability and poor infrastructure.**

A new style of **Fastflow, cashless, ultra-frequent direct core urban services** utilizing 18 metre articulated vehicles with multiple doors is required **at the heart of city networks to deal with the density of travel quickly and efficiently.**

For longer distance trips into towns and cities, new stylish **commuter and interurban express services** are required with a superior internal vehicle environment.

Both styles of service will be predominantly used by former car commuters.

Pricing

People are **not motivated to invest in a car because it is cheaper than travelling by bus** but by a host of factors related to **convenience, reliability, status, fashion, style and utility.** Replicating those features in a bus environment at a sensible price is what is required.

Pricing is going to have to change as radically as networks with a whole different mindset and psychology than the current traditional approach.

A simple, universal UK wide ticketing back office and standard processes can **remove the mystique behind bus payment and pricing** which has **always been a barrier to casual use.**

Customers should have a **roaming feature in their payment token allowing them to board any bus anywhere in the UK at any time**, simply present their payment token to the validator **and sit down knowing they will be charged the best price for the travel they consume.**

Vehicles

Vehicles will require to **evolve in Operating Speed, Passenger Capacity, Fashion, Style and Quality, Environmental Impact, Autonomy, Digital Connectivity and Entertainment and Service Type.**

Designing vehicles and payment arrangements **to absolutely minimise dwell time** at stops is critical.

The much greater passenger volumes require the deployment of **18m and 24m articulated urban buses.**

To capture the longer distance commuter market will require **vehicles with a superior level of internal comfort and connectivity.**

Infrastructure

The **Public Sector needs to deliver** suitable **road and highway infrastructure** to facilitate the mobility transformation.

There needs to be a **moment in time in every urban area when the community collectively decides to design streets to prioritise the movement of people, not vehicles** both to improve bus speeds but also to allow room for walking and simply enjoying green spaces.

Where **private sector operators** are prepared to **begin delivering trailblazing *Net Zero* style bus routes** now, that **initiative needs to be matched by** appropriate short term action by **the relevant Highway Authority.**

Bus Stations will become a **critical, high-profile component of town, city centre and suburban area infrastructure** and will need to be located conveniently, designed to a high standard, and contain a wide range of complementary facilities and services providing added convenience to bus commuting.

Outside of major centres, there needs to be **Mobility Hubs** where customers can conveniently **switch from their core bus service to feeders and shuttles, park their bike or pick up a rental bike or scooter etc** to make their whole journey more convenient.

Bus stops need to be stylish and iconic reinforcing the bus as the premium mode of mobility in urban areas for all.

Buses and coaches will need to **seamlessly integrate with other modes of mobility** including taxis, rental cars, trams and trains **wherever they come into proximity with each other.**

Our **towns and cities will look very different** by **2050** and for the better **with the removal of large car parks**, much cleaner, healthier air and **people able to enjoy walking and cycling** around a pleasanter city environment **without the noise and congestion caused by incessant traffic.**

Technology

Traffic, parking and pollution have gradually **diluted the promise of the car age** but **technology can now bring the tools to allow the bus to slowly claim back its role as the prime mode of urban mobility** reinvented for the digital age.

Bold smart use of modern digital technology can **make bus services** across the UK **by 2050** as different as an **iPhone 15 is to an old 1930's black telephone receiver.**

Through technology, the **number of excuses for delivering average bus services are falling by the day** and **any operator not delivering year on year improvements** in reliability and punctuality over the next decade **is simply not trying hard enough.**

There needs to be much **more clarity and consistency across the UK on how to pay for bus travel, and how pricing works**, if we are to demystify using the bus. **Allowing every town or city and every operator to invent their own ticketing 'wheel'** isn't going to facilitate mass transfer of customers from private car to bus.

We need to **remove the mystique and friction surrounding bus payment and pricing** replacing it with clarity and simplicity **giving everyone confidence to catch a bus any time anywhere without wondering how or what to pay.**

It is possible to envisage creating **segregated BRT infrastructure, either elevated, underground or simply barriered off, delivering core high frequency urban operations with autonomous 24m bi articulated fleet** maximising passenger capacity.

Marketing

The market of the future, if the car is tamed, will be **substantially bigger and more diverse** requiring a fundamentally different approach to marketing.

Over the next 25 years, it should be possible for **the bus and car to swap market shares** with the bus delivering well in excess of 60% of urban travel and the car down below 20%.

That won't happen overnight.

Indeed, it **won't even happen over 25 years if we don't change the mindset and ambition right now!**

Climate Change and the **Environment** will be **at the heart of the marketing message**, but that message needs to be **delivered in the context of a bus offer and image radically different to what has prevailed over the last 50 years.**

We do not want **people travelling by bus** because it is a '*climate obligation*' but **because it is a safer, healthier, more efficient, stylish, fashionable and attractive way to get around town.**

This is not simply a journey about the bus but about the nature of the planet and the nature of our towns and cities. We cannot and **must not attempt to go on this journey alone but with allies** who also care about our planet, our towns and our cities.

Marketing activity for the renaissance of the bus **begins with winning hearts and minds to the cause of truly managing traffic** and fully prioritising **Active Travel and Mass Transit.**

Marketing, in its broadest sense, is fundamental to building a bolder, bigger, brighter, better future for the bus in the UK creating a **business model serving a**

positive social purpose in an environmentally and financially sustainable way.

It is every bit as important as the work which needs to go into network design, pricing and payment, vehicles, infrastructure and technology.

People

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 an additional 700,000 drivers in 25 years time**. Spread evenly from now, that implies **increasing the driver workforce**, alone, by nearly 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%**.

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?**

Funding

The overall transformation of our towns and cities and the future control of traffic in them, and the major roads between them, **has to be formally led and funded by the public sector at the local level.**

The **first steps can be relatively low cost** by simply closing key streets to through traffic prioritising pedestrians, cyclists and buses.

As the **hearts of urban areas are restructured and car use discouraged**, there needs to be the **development of environmentally friendly mass transit operations** and, in most places, they will best be delivered by bus.

And that is the **opportunity for the bus to be bold and to shine.**

These **new style bus networks have the strong possibility to be financially self sustaining if they are well planned, designed and delivered riding the wave of the much improved traffic environment.**

There then needs to be a **'new deal' hammered out by the operators and government on funding.**

Part of that deal should involve the **progressive replacement of 'free travel schemes' with discount schemes to ensure they are financially sustainable in the context of massively more extensive and comprehensive bus networks.**

Removing the two huge negatives of the impact of congestion and free travel from the bus market opens up the possibility of long term sustainable commercial operations compatible with the public sector urban policies of *Active Travel and Mass Transit First*.

There will be **significant need for government to invest in infrastructure.** Careful use of **congestion charging or road pricing** will also aid in keeping the streetscape free of unnecessary cars whilst also contributing to funding.

Government also needs to be proactive and alert in how it manages the gradual loss of Fuel Duty income on petrol and diesel cars and, perhaps, **replace it with an intelligent road pricing regime** applying to their *zero emission* successors.

Operators will need to invest in more, and better quality, buses, additional depot infrastructure, additional driving, supervisory, maintenance and customer service staff as well as covering the cost of designing, marketing and delivering bigger networks.

There will also be a case for **government and operators sharing the development mileage costs of new additional services with tapered funding to cover the early stages of operation.**

The switch to *Active Travel and Mass Transit* will **improve air quality and take pressure off both health and social care resources, reduce deaths and injuries from collisions, create more employment and revive city and town centres.**

The **increased employment** both directly in the bus industry and in stronger town and city centres will **increase tax revenues** and contribute to economic growth.

Rural connectivity will also improve.

These are all returns on the public sector investment.

From an operator perspective, bus speeds should improve materially both reducing costs and increasing demand and revenue whilst network growth on free running streets should **provide a positive financial return.**

Governance

We have now seen the **Business Plans for the first three Combined Authorities** committed to Franchise their urban bus networks. They cover the same timescale as this exercise but **focus predominantly on delivering the 'status quo'** with greater integration around ticketing and a slower pace of **managed decline in bus demand**.

Their plans are **focused predominantly on governance rather than the substance of the bus product and the delivery of transformational modal shift**. Most importantly, they are **silent on car constraint and** the successful delivery of **the local transport contribution to *Net Zero*** in 25 years time.

All the effort is going into changing the governance model, **not growing, deepening and widening the market with ongoing product development**.

The **alternative Enhanced Partnership Model** provided in the 2017 Bus Services Act also **does not inspire confidence as the Competition and Markets Authority Guidance** on Partnership arrangements **stunts their growth and potential with restrictions on their length and nature**.

Truly ambitious partnerships need to be long term with room to develop and breathe **if they are to deliver bold, radical change**.

Buses are an important part of local social and economic infrastructure and, therefore, **local authorities must have legitimate input into network design** but they are **also a consumer product where the marketing and commercial skills of operators are equally important** in developing the network.

Buses do not exist in a vacuum and a direct partnership between a Transport Authority and Bus Operators can only go so far. **A true Urban Mobility Partnership needs to recognise that partnership working should encompass, not just the Bus Operators and the Authority, but those allies who share views, values and involvement with both the Authority and Operators**.

It would draw its **powers and its funding from both the public AND private sectors** and deploy them in the interests of the community.

What could possibly go wrong?

Addiction to the car is deep seated. Times and the mood of the population are changing but the biggest hurdle to overcome is **the addiction which prevents**

people stepping back and absorbing the madness that is **'traffic'** and its association with **'congestion'** and **'pollution'** and **'poor health'** and **'death'**.

Without a sea change in the attitude to **'traffic'** an **Active Travel and Mass Transit First** environment will not thrive.

Driver shortage in the bus industry has always been endemic threatening the consistent reliability of service delivery. Recent research published in *The Lancet* confirms that **plummeting birth rates in all major western nations will make them reliant on immigration for the remainder of this century.**

Currently the **UK door is closed to international bus drivers** and, **unless that situation changes,** the necessary growth in fleet and service levels to deliver **the volume of modal shift required will be impossible.**

This **proposal will only work with the full engagement of the private sector bus industry, itself and an acceptance by the Combined Authorities moving toward Franchising that the challenge of Net Zero creates a bus requirement which would be extremely challenging for them to directly fund and manage.**

One way of resolving that problem would be to **change the franchising risk profile - reverting to operator owned assets and the possibility of operators taking revenue risk on commercial concessions instead of franchised contracts.**

This proposal also requires a foundation of alliances, co-operation and partnership to succeed.

It is **imperative for buses, trains, trams, taxis, bikes and scooters to accept that they are all on the same side** and need to present a joined up alternative to the car if the whole strategy is to succeed.

Similarly, **the existential challenge of Net Zero needs to be underpinned by a strong political consensus in what is, of necessity, a long term direction of travel over the next 25 years.**

Next Week

Episode Fourteen will be the final weekly article setting out where we should go from here.

It will be accompanied by a refined, consolidated version of the Proposals entitled

**'The Future of Mobility
Riding the Bus to *Net Zero*'**

free to download and share.