

Making Travel Smarter...

Use The Bus!



Agenda

- The Bus as a Smart Travel Solution
- The Future of Bus Travel
- A Future under Threat
- Recipe for Success



The Bus as a Smart Travel Solution

- **Backbone of public transport**
 - 59% of all PT journeys. 3 times rail. 9 times more than by tram or light rail
- **Efficient**
 - 3 to 6 times more passengers carried per sq.m of road space Vs car
 - Only 25% of public transport spend over the last decade
- **Flexible**
 - Service and vehicles evolve with demand
 - Limited need for supporting infrastructure
- **Clean**
 - 30% cleaner than rail per passenger km
 - 10% of buses are ultra low emission Vs 1% of cars



The Future of Bus Travel

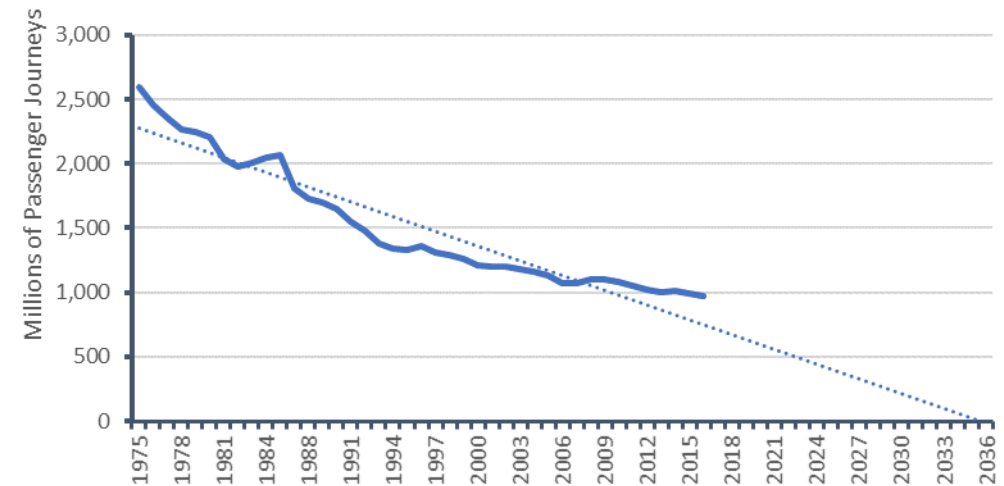
- **Connected**
 - Universal ticketing. Transparent schedules. 100% RTPI. MAAS integrated
- **A zero emission vehicle**
 - 150 mile range double decks possible today. On costs reducing year on year
 - Electrify the whole UK bus fleet for a quarter of the cost of HS2...
- **A place to relax**
 - Free Wifi. Phone charging. Hi-spec. materials & lighting. Five miles of fun!
- **Not a minibus or a taxi!**
 - Up to 6 times more road space per passenger than a bus
- **Autonomous?**
 - Benefits for rural services & operators. Customer experience?



A Future Under Threat

- **Ridership in decline**
 - >50% of non users site the car as the main reason
 - Average passenger load has halved since 1975
- **Congestion on the rise**
 - Average urban speeds down 1.5 mph in last 3 years
 - Autonomous electric cars not the answer
- **Public spend on bus at a ten year low**
 - 40% of spend in 2005
 - 14% in 2016/17
- **Operator investment strategy impacted by adverse trends**

Bus Passenger Journeys
English Metropolitan Areas Exc London
1975 - 2035



A Recipe for Success

- Bus as part of an integrated solution
- Disincentives for urban car use
- No longer “Cinderella” in Public investment
- Operator investment in accessibility & defining appeal
 - Universal ticketing. MAAS
 - Voice of the customer
- OE investment in delivering appeal, clean credentials & lower costs
 - Reduced EV costs via efficiency and battery procurement strategy
- Be smart, use the bus!

