ENGLAND'S ECONOMIC HEARTLAND

The Economic Impact of Local Bus Services

CONTENTS

// FOREWORD

We all instinctively understand the immense value buses bring to our society and economy. They are the arteries of our communities—linking people to employment, education, healthcare, and leisure, while driving local economies and fostering social inclusion.

Thanks to the detailed analysis in this report, we can now quantify that value—both at the regional level and within each local authority—providing a powerful evidence base to guide future investment and policy.

Every day, 360,000 journeys are made by bus across EEH. These are not just trips—they are opportunities. For many, especially in rural and underserved areas, buses are the only viable form of public transport. They offer affordable, flexible, and low-emission mobility, helping to reduce congestion, cut carbon emissions, and improve air quality. In a region where no single urban centre dominates, the bus network is essential for ensuring equitable access and economic cohesion.

The economic contribution of buses is profound. The sector directly and indirectly supports over 12,000 jobs and generates £580 million annually through wages, supply chains, and investment. Bus passengers themselves contribute over £2.6 billion to local economies through spending on high streets, in shops, and at leisure venues. Moreover, the wider social and environmental benefits—ranging from improved health outcomes to reduced road congestion—are valued at nearly £1 billion.

This report underscores that the relatively modest investment in bus services (compared to other modes) is not just a transport decision—it is an economic imperative.

For every £1 of public money spent, up to £4.55 in wider economic benefits is generated. As we look to the future, enhancing our bus network will be key to unlocking inclusive growth, supporting decarbonisation, and improving quality of life across the Heartland.

Our Board is clear that buses can – and must – do so much more. As a region (which includes the entirety of the Oxford-Cambridge Growth Corridor) we have some unique opportunities to harness bus within an integrated transport system.

For example, buses will be essential for maximising 'door to door' connectivity to and from East West Rail stations to homes, workplaces, and visitor destinations. They will support the growth of our towns and cities, and are critical to the success of any new towns which may come along in the future. Major planned development, such as Universal, Puy du Fou and the proposed expansion of London Luton, Heathrow and Stansted airports, will all need to utilise bus and coach for both staff (including during construction) and visitors.

That's why buses are such a significant priority for EEH. Our work – which has attracted praise from senior figures within DfT – includes:

- Progressing our 'Heartbeat bus network', which identifies the strategic bus routes which, if improved, could transform journeys across the region.
- Exploring the possibility of widening the benefits of the Luton-Dunstable busway and improving bus access to the expanding London Luton Airport
- Supporting partners who choose to franchise or to strengthen their enhanced partnership model.
- Advocating for mass rapid transit proposals in areas such as Hertfordshire and Milton Keynes
- Working to attract private investment in mobility hubs
- Understanding opportunities for 'total transport' and 'demand responsive transit'.

Going forwards, success will be dependent on all of us – EEH, local authorities, national government, asset owners and transport operators – working together to secure improvements to services.

This report, developed in partnership with KPMG, demonstrates the prize on offer – and provides compelling evidence to champion the bus as a cornerstone of a thriving, connected, and sustainable region.

Cllr Liz Leffman
Chair
England's Economic Heartland
July 2025

// EXECUTIVE SUMMARY

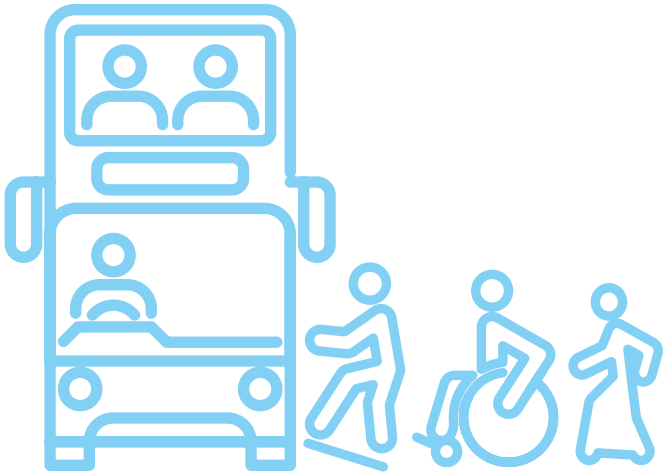
Local bus services facilitate 360,000 journeys a day across England's Economic Heartland (EEH). Buses are the most used form of public transport. These journeys create direct economic impacts for passengers and operators, with additional benefits for supply chains and communities across the region. This report seeks to quantify these impacts.

ECONOMIC ACTIVITIES OF THOSE INVOLVED IN THE PROVISION OF BUS SERVICES

It is estimated that across EEH over **4,600 people** were directly employed in the provision of bus services in 2022, including drivers, mechanics, schedulers, operations managers, customer service representatives, and those involved in corporate functions such as finance, information technology, human resources, and general management.

Additionally, **over 8,000 people** were indirectly employed, working in supply chains including vehicle manufacturers, fuel suppliers, maintenance and parts, and technology providers (e.g. real-time information and ticket machines), and those responsible for bus stations, stops, and depots.

Those directly or indirectly involved in the provision of services also spend their wages in local economies, which induces additional local employment. The total net value of direct, indirect, and induced employment, including wages, operating costs, operating profits, and taxes, is estimated at **£580 million per year**.



ECONOMIC AND SOCIAL ACTIVITIES OF BUS PASSENGERS

For many, buses are the best way to access work, education, healthcare, and leisure activities. Compared to not travelling at all, or travelling another way, bus services provide benefits to passengers in the form of lower travel costs and improved connectivity. Using Department for Transport ("DfT") appraisal guidelines, these benefits total **£430 million per year** across EEH.

Additionally, there are benefits to bus users in terms of health and wellbeing improvements, arising for example from buses being a more active mode, benefits associated with highway decongestion and modal transfer and benefits from people who don't use the bus but value the services buses provide to others as well as valuing the preservation of the option to travel by bus even if they don't do so currently. These economic impacts total **£520 million**.

ECONOMIC IMPACT OF BUS PASSENGERS INTERACTING WITH LOCAL ECONOMIES

Bus passengers spend over **£2.6 billion per year** in local economies across EEH. This spending supports economic activity in local and regional centres across the region.

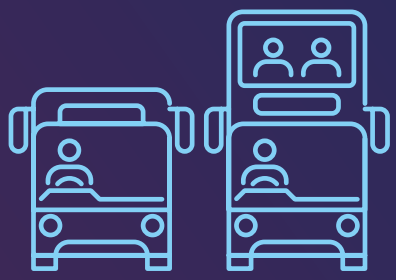
This spending supports economic activity in local and regional centres across EEH. Over **185,000 commuters** in EEH rely on buses to get to work, providing businesses in our local economies with access to labour. These commuters earn approximately £3.4 billion per year and generate tax revenue of almost £720 million per year.

Without local bus services, some passengers would find alternative ways to access these centres, but other trips would be suppressed, leading to expenditure being undertaken online or not undertaken at all. This could result in High Streets across EEH losing **over £580 million** per year.

These economic impacts vary across EEH, with more densely populated areas with better bus services having larger impacts than those regions with poorer services and less people.

Investing in bus services can provide significant economic value. Based on a selection of typical investments to improve bus services, it has been calculated that every **£1 of public money spent generates as much as £4.55** in wider economic benefits.

ACROSS ENGLAND'S ECONOMIC HEARTLAND...



360,000 bus journeys per day

Bus sector valued at **£580m** per year, directly employing **4,600 people**, with a further **8,000** indirectly employed through supply chain

Improved outcomes for people, communities and the transport system valued at

£951m per year

185,000 commuters in EEH rely on buses to get to work, earning **£3.4 billion** per year and generating tax revenue of almost **£720 million** per year

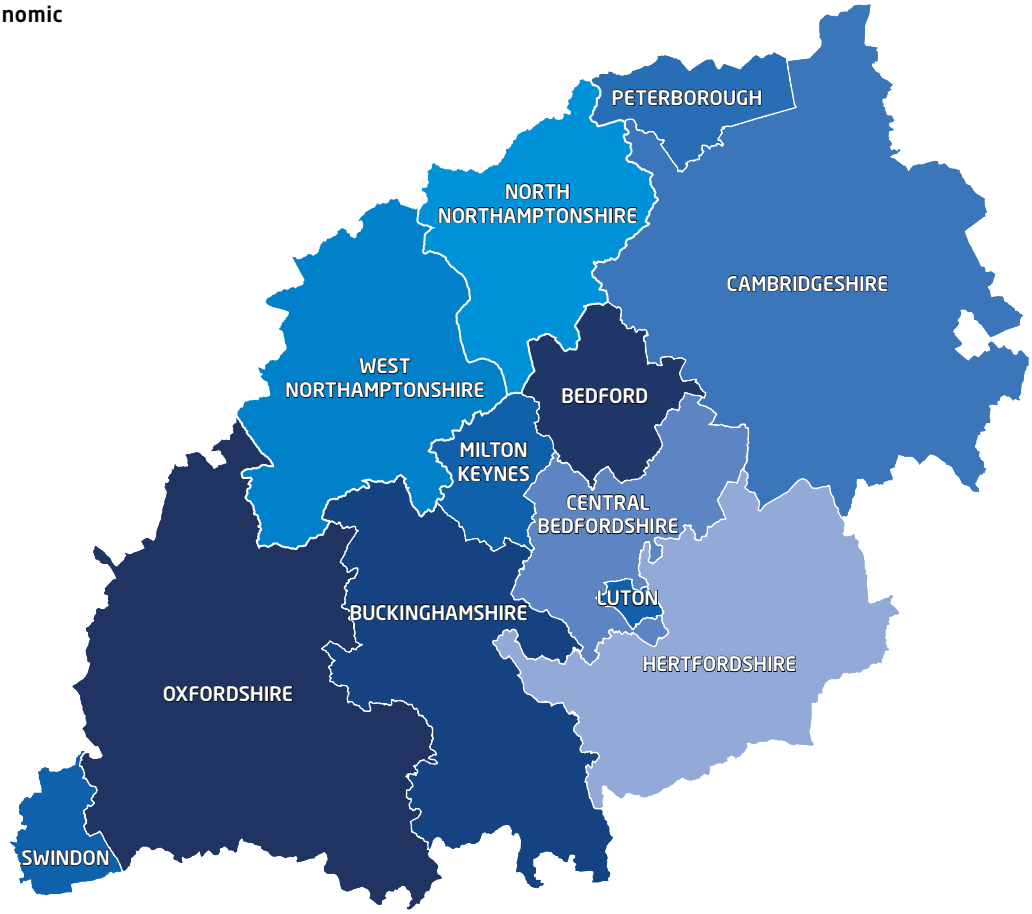
Bus passengers spend over **£2.6 billion** per year on the 'High Street'

Every **£1** of public money spent on improving bus services in the region generates as much as **£4.55** in wider economic benefits

See pages 18 to 29 for breakdown of findings per local authority area

// INTRODUCTION

The England's Economic Heartland region



Good local bus services are vital to the functioning of communities across the England's Economic Heartland (EEH) region. Buses have several advantages over other forms of transport in that they:

- Require relatively low levels of capital investment
- Have relatively low operating costs
- Are flexible, able to serve any destination at any time of day
- Produce relatively low emissions per journey

Given these advantages, buses provide a cost-effective, efficient, and clean transport service for many people in cities, towns, and rural locations. In many parts of the EEH region, they are the only realistic form of public transport, particularly for the 35% of the population which lives in small market towns and their rural hinterlands. Indeed, the polycentric nature of the region (no urban centre contributes more than 5% of the region's total population), makes the performance of the bus network absolutely vital.

This report – prepared with the assistance of KPMG – presents analysis exploring the economic impacts of providing and using bus services across the EEH region and for the 12 local authority areas within it (see pages 18 to 29). The work was commissioned by EEH and undertaken between January and February 2025.

The objective of the study is to understand the range of economic impacts linked to these journeys. This can be viewed through three lenses:

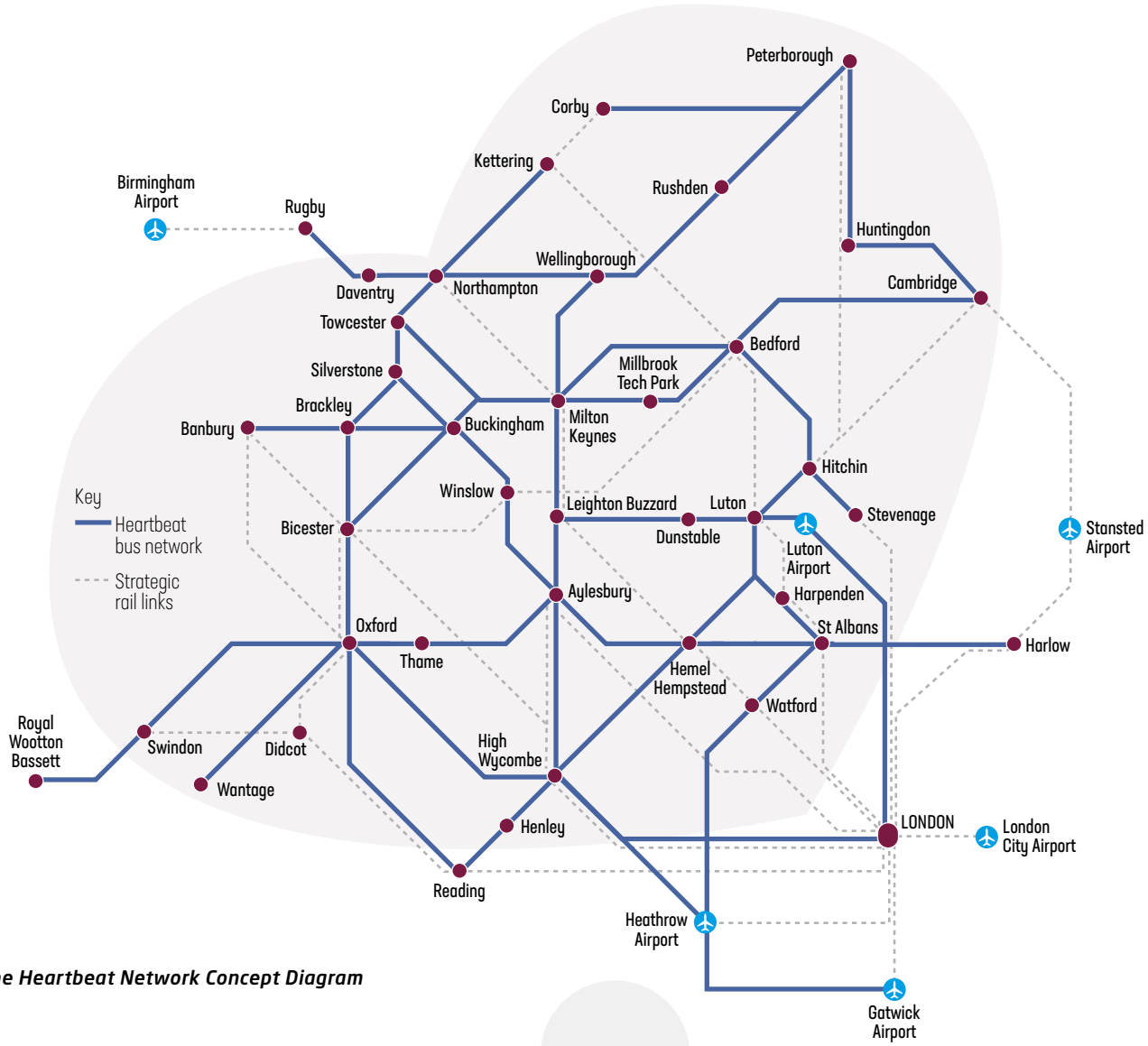
Lens 1: The economic activities of those involved in the provision of bus services, including benefits for companies, employees, and their supply chains.

Lens 2: The economic and social activities of bus passengers, including direct benefits to passengers and benefits to other road users and the wider community.

Lens 3: The economic impact of bus passengers interacting with local economies, including passenger spending on goods and services on the High Street.

Exploring these impacts enables an understanding of how buses create different types of economic value, deliver environmental and social benefits, and unlock wider activities.

England's Economic Heartland's proposed Heartbeat network is based upon connecting transport hubs and key destinations within the region, providing for better cross-local transport authority journeys and integrating with the existing local bus services. The Heartbeat network is not a direct replacement for successful bus routes but rather brings together 37 routes including 15 existing routes (at 30mins or less frequency), 11 other existing routes (which require improved frequency to 30 mins of less) and 11 new connections, which would also require minimum frequencies.



The Heartbeat Network Concept Diagram

// METHODOLOGY

We have structured our analysis to cover different areas of economic activity through the three lenses. These are shown opposite (Figure 1) and described in the following text.

It is important to note that there are some overlaps between each lens, meaning that it is not straightforward to provide a single estimate of the total economic value of local bus services. Instead, the three-lens approach provides different perspectives on the contribution local bus services make to local communities.

Economic Activities of those involved in the provision of bus services

The first lens focuses on the economic activities of those involved in the provision of bus services. This includes:

Direct impacts comprised of:

- The creation of value from the returns to business investment assessed through company profits (and associated taxes), minus subsidies received from the government.
- Direct employment generated by these businesses and the wages paid to employees.
- Direct operating costs incurred, including fuel, administrative overheads, and maintenance.
- Capital investment focused on purchasing buses manufactured in Britain.

Indirect impacts comprised of:

- The spending of the supply chain into the wider economy on goods and services used as inputs for products supplied to the bus sector.
- The spending of bus manufacturers in the wider economy on goods and services used to manufacture buses.

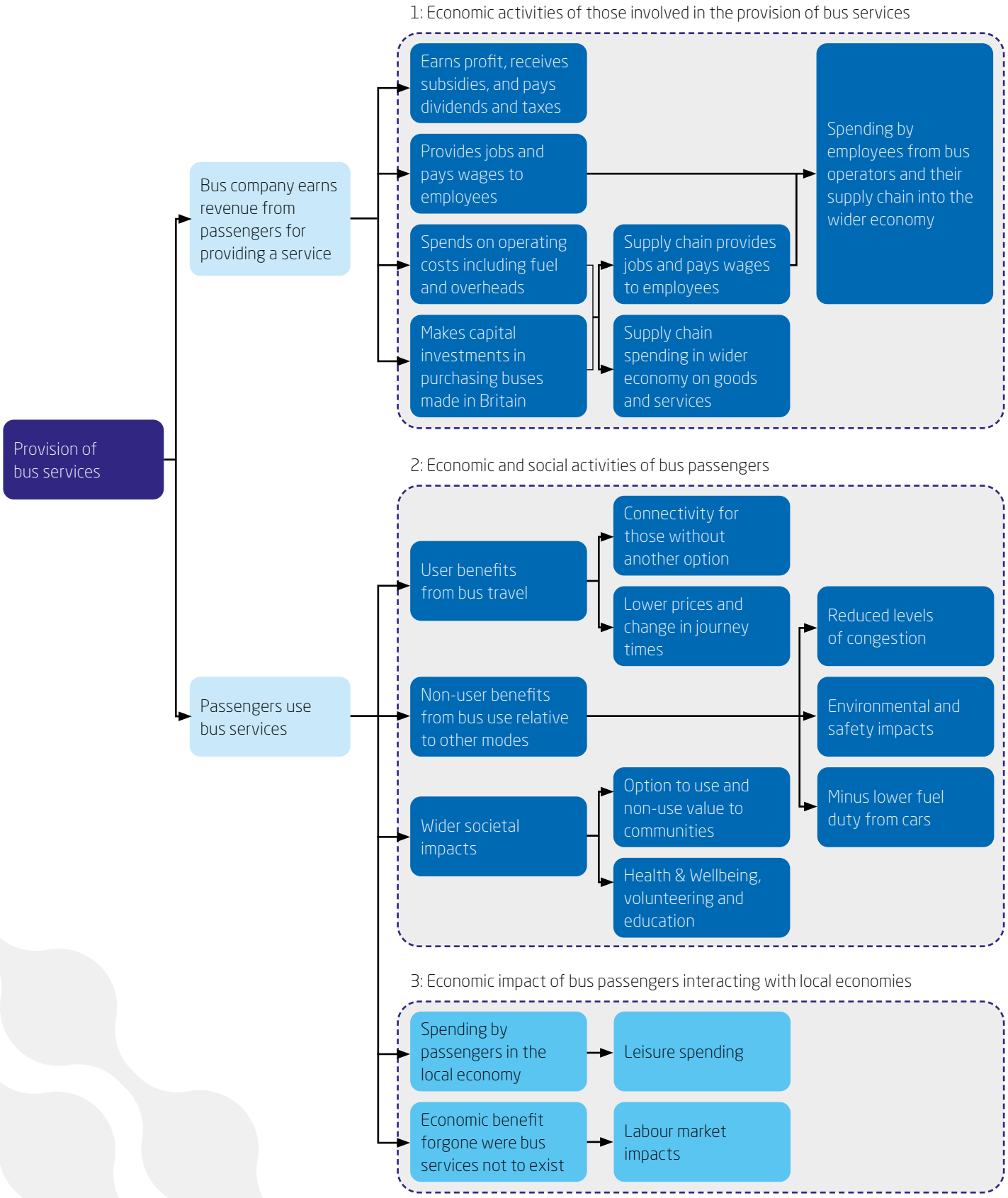
Induced impacts comprised of:

- Spending by employees from companies operating buses and their associated supply chains into the wider economy.

In assessing these impacts, key source data includes the number of employees in the bus sector across different geographies, gathered from the Business Register and Employment Survey (BRES) dataset collected by the Office for National Statistics (ONS).[1] When this data is combined with average wages in the bus sector, sourced from the Annual Survey of Hours and Earnings (ASHE), also collected by the ONS, it enables the assessment of direct employment impacts. Our estimate of operating costs uses a breakdown of bus operating costs presented by the Confederation of Passenger Transport (CPT).[2]

To subsequently derive the indirect and induced impacts, economic multipliers were used, sourced from the relevant Input-Output tables, with the Land Transport (excluding rail) sector segmentation being applied. The Input-Output tables are prepared by the Office for National Statistics.[3]

Figure 1: Analytical framework consisting of three lenses



Economic and social activities of bus passengers

The provision of bus services brings benefits to users, non-users, and communities across EEH.

Through this lens, the impact can be assessed as follows:

- The benefits of bus travel accruing to passengers, including better economic connectivity, social accessibility, and affordability relative to other transport modes.
- The benefits to other road users from the reduction of private vehicles, bringing reduced highway congestion and improving environmental outcomes—air quality, greenhouse gases, and noise—but generating less tax revenue from fuel duty due to fewer car journeys.
- The value that accrues to people and communities from having bus services available as a travel option, even if not used, through an estimated 'option and non-use value'.
- The wider societal impact, which includes health and wellbeing benefits of using bus services, as well as education and volunteering benefits.

The framework for assessing user and non-user benefits broadly follows the approach outlined in the DfT's Transport Analysis Guidance (TAG).[4] This approach converts the number of bus journeys undertaken into monetary benefits by using a set of appraisal values for a range of benefits, derived from economic literature, and following the approach outlined in TAG.

By improving connectivity, bus services enable businesses to derive productivity benefits from being in closer proximity to other individuals and firms. These agglomeration economies (benefits derived from the clustering of economic activity) arise from improved labour market interactions, knowledge spillovers, and linkages between suppliers. These wider economic impacts have not been quantified in this analysis, given the challenges associated with assessing how the density of our urban areas would change were the bus network to be removed. However, they are expected to be significant, with agglomeration benefits found to represent up to a 25% uplift over standard transport user benefits.[5]

Option and non-use values are defined as the value placed by the community on the availability of a service, even if they choose not to use it. This can serve as a fallback plan in case things go wrong or be perceived as a benefit for the wider population, including friends and family who may be more able to visit them. In assessing the scale of these impacts, the values outlined in TAG per household are used.

In calculating the wider societal impacts of buses, a broader range of evidence has been compiled, reflecting the innovative nature of this appraisal. This draws on the approach adopted in a KPMG report for Greener Journeys (2016).[6] This enables an improved understanding of the social value created by enabling people to access better education and engage in volunteering to support local communities.

Economic impact from bus passengers interacting with local economies

Buses take passengers to leisure, shopping, and employment destinations, where they interact with the local economy by purchasing goods and services. To understand the scale of this spending, we have combined passenger numbers and journey purpose estimates with data on the average spend per shopping, leisure, and commuting trip from a range of sources.[7]

If bus services were not provided, some passengers would seek alternative forms of transport to make their journey, while others would not travel at all. Using evidence from the DfT on the likelihood that passengers would not make the trip if the bus service were unavailable, we have estimated the proportion of spending attributed to journeys no longer made. While this expenditure may be diverted to other uses, such as online retail, it is far less likely to be spent on the High Street if the bus were not available.

Bus services enhance connectivity, enabling people to access a wider range of employment opportunities than might otherwise be the case. If the bus service were removed, those with limited alternative options, particularly those without a car, would have reduced access to employment opportunities. They might be forced to take a lower-paid job (implying a lower productivity role) or no longer enter the labour force.

// QUANTIFICATION OF IMPACTS

Using the analytical framework, we have quantified the economic impact through each lens for different geographical areas.

The table below shows the economic impact of bus services across EEH, covering the economic activities of those involved in the provision of bus services, the economic and social activities of bus passengers, and the economic impact from bus passengers interacting with local economies. A breakdown of the figures per local authority can be found from pages 18 to 29.

Economic activities of those involved in the provision of bus services		Economic and social activities of bus passengers		Economic impact of bus passengers interacting with local economies	
Taxes, wages and industry profit and investment into supply chain	£300m	Increased connectivity and more affordable travel	£430m	Leisure spend	£894m
Spend by supply chain	£125m	Impacts on other road users	£29m	Commuter spend	£596m
Spending by employees in operations and supply chain	£155m	Option of having buses as a mode	£393m	Shopping spend	£1,165m
		Wider societal impacts	£99m		
Total	**£580m**	**Total**	**£951m**	**Total**	**£2,655m**

// ECONOMIC ACTIVITIES OF THOSE INVOLVED IN THE PROVISION OF BUS SERVICES

In 2022, over 4,600 people across EEH[8] were directly employed in the provision of bus services. This includes drivers, mechanics, schedulers, operations managers, customer service representatives, and those involved in corporate functions such as finance, information technology, human resources, and general management, generating over £140 million in wages.

Additionally, over 2,300 people were indirectly employed in supply chains, including vehicle manufacturers, fuel suppliers, maintenance and parts providers, technology providers (e.g. real-time information and ticket machines), and those responsible for bus stations, stops, and depots. This sector spent £160 million on operating costs within the supply chain. The total net direct impact is assessed to be £300 million.

While the economic impact of the direct employment and supply chain expenditure is significant, it also delivers indirect impacts through the spending of the supply chain on the inputs required to deliver the necessary goods and services. This impact is estimated to be worth £125 million per year across EEH.

Those directly or indirectly involved in the provision of services also spend their wages in local economies, which induces additional local employment generating a further £155 million in economic impacts.

The total net value of direct, indirect, and induced employment, including wages, operating costs, operating profits, and taxes, is estimated at more than **£580 million per year**.

// ECONOMIC AND SOCIAL ACTIVITIES OF BUS PASSENGERS

Connectivity and affordability

For many, buses are the best way to access work, education, healthcare, and leisure activities. Compared to not travelling at all or using other modes of transport, bus services offer benefits to passengers in the form of lower travel costs and improved connectivity. The scale of these direct transport user benefits is significant, amounting to £430 million per year across EEH, covering both affordability and connectivity advantages.

Connectivity benefits are measured in terms of the journey time differential between buses and other alternative modes of transport, as well as the reliability and quality of the service offered. This varies greatly across the country; in some areas – particularly rural locations – buses are the sole alternative to car travel, providing lifeline services, whereas in other areas, buses offer an affordable service compared to alternative modes.

Impacts on other road users

The impacts on other road users reflect the positive effects associated with people travelling by bus instead of by car. These benefits include reduced highway congestion, improved safety, and decreased atmospheric and greenhouse gas pollutants. However, these positive impacts are partially offset by the reduction in indirect tax receipts resulting from lower fuel duty as people switch from cars to buses.

Buses provide an alternative to private transport. The more they are used instead of cars, the greater the benefit in terms of reducing congestion. This is particularly important in densely populated urban areas where space is limited. Additionally, fewer cars can reduce the need for investment in new roads and the maintenance of existing ones due to wear and tear.

Buses are one of the safest modes of transport in the UK. Road casualty data reported by the DfT for 2022 indicate that bus travel can be up to twice as safe as car travel.[9]

Public Health England highlights that human-made air pollution is responsible for between 28,000 and 36,000 deaths every year in the UK.[10] With lower emissions per passenger kilometre than cars, buses support cleaner air in our towns and cities, and make a significant contribution to lowering this risk.

Buses can play a role in the transition to Net Zero. Research shows that, in the UK, a petrol car journey emits between 2.6 and 3.5 times more CO_2e per passenger kilometre than the equivalent bus journey.[11]

The total benefits for other road users amount to **£29 million per year**, the majority of which are congestion and safety benefits.

Option of having a bus service available

The provision of bus services brings additional benefits in the sense of option values, representing a fall-back option for those who usually do not need buses as well as when this may be the main mode of transport for friends and family.

We have estimated, using TAG appraisal guidance, that this option value brings total benefits of over **£390 million per year**.

Wider societal impacts

Buses provide benefits to the economy and society beyond those typically considered in government appraisals, highlighting the role buses play in helping people access education and connect with friends and family. The table below illustrates the areas where we have available evidence to quantify these impacts.

When combined the total wider societal benefits amount to almost **£100 million per year**, the majority of which are active travel and volunteering benefits.

Wider Societal Benefits

Category of Benefit	Value
Fiscal benefits from improved healthcare outcomes	£41.0m
Psychological wellbeing from mode shift and reduction in commute time	£1.6m
Increased employment and education leading to fiscal benefits from reduced healthcare	£17.8m
Access to volunteering opportunities	£38.5m

Bus as the only public transport option

Rushden in North Northamptonshire has a population of 32,000[1] and does not have a railway station. Therefore buses are the only scheduled, accessible, and reliable form of public transport, ensuring the local population can access services and amenities.

Rushden is classified within the 20% most deprived areas in Britain, facing challenges in areas like income, employment, education, and health. As at 2019, 24% of the population lived in income-deprived households (compared to 13% nationally) and 10% lived in overcrowded housing (compared to 2% nationally)[2].

The closest railway station is Wellingborough, located approximately 4 miles from the town centre. Buses remain the only credible way to access major employment centres such as Northampton within an hour of travel time. There are regular services from Rushden to Northampton and other metropolitan areas running every 20-30 minutes[3].

Sources:
(1) ONS population stats (https://explore-local-statistics.beta.ons.gov.uk/areas/E06000061-north-northamptonshire)
(2) Index of Multiple Deprivation (Index of Multiple Deprivation (IMD) | CDRC Data)4
(3) Travelinewebsite (https://www.traveline.info/)

Attitudes to bus travel

In January 2023 market research agency Census Wide carried out a survey for EEH on attitudes to bus travel via an online questionnaire. A total of 7,002 people from across all parts of the EEH region took part. Findings included:

- 60% of people who had used a bus in the last 12 months rated the quality of their local bus service as 'good'.
- Uncompetitive journey times (particularly when compared to other modes) were the biggest reason why people were put off from travelling by bus.
- The cost of fares was another important factor consistent across age groups and income levels, while frequency, convenience/ availability of routes, reliability and comfort were also important factors.
- There was an appetite, particularly amongst younger people, to use buses if the service offering improved. Only 5% of under 45s said 'nothing' would encourage them to use buses more, compared to 11% of those aged 45-54 and 20% of over 55s.

Source: Item_4_Future_of_Bus_Annex_1_Strategic_Transport_Leadership_Board_03_March_2023_update.pdf

There are further wider societal benefits to bus travel which our analytical framework is unable to incorporate. The scope of traditional appraisal methods does not take account of all of the wider social impacts arising from participation in employment, education, health and community-based activities.

With 17% of people in the UK at risk of poverty[12] and almost 1 in 4 households in Britain without access to a car[13], local bus services can help households to participate in society. Analysis conducted by KPMG and ITS Leeds[14] has shown that after allowing for other factors that influence deprivation, a 10% improvement in local bus service connectivity in town and city neighbourhoods is associated with a 3.6% reduction in deprivation as measured by the Index of Multiple Deprivation ("IMD").

// ECONOMIC IMPACT FROM BUS PASSENGERS INTERACTING WITH LOCAL ECONOMIES

We have assessed the benefits generated by users spending money in the economy while making journeys on buses, as well as the impact buses have on the job market. These benefits have been categorised by journey purpose – leisure, shopping, and commuting.

Bus passengers in EEH travelling for shopping spend **£1,165 million** annually in their local economies, including on high streets and in shopping centres. Passengers travelling for leisure spend almost £895 million on dining out and visiting local leisure facilities, while commuters spend almost £600 million on lunch and other goods and services.

A proportion of these trips would not occur without the availability of bus services. For some, buses are their only means of accessing essential services.

It is estimated that over £580 million of the spending by shoppers, commuters, and leisure travellers would not occur within the local economy if bus services were unavailable. While this money might be spent elsewhere in the economy – such as on online retail, which now accounts for 27% of retail spending compared to around 10% a decade ago [15] – it may not benefit the local economy or high streets.

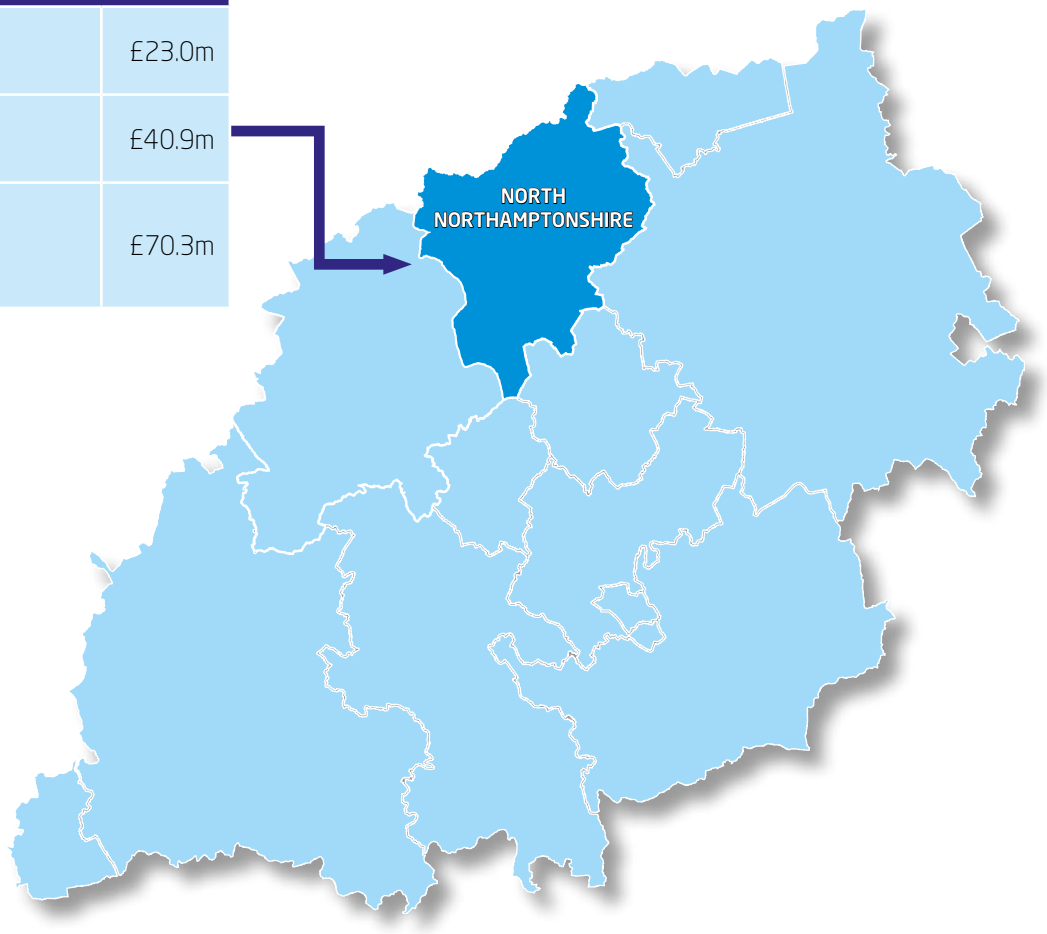
Over 185,000 commuters in EEH rely on buses to get to work, contributing £3.4 billion in Gross Value Added ("GVA") from their wages. While many of these workers might use other transport methods to reach their place of work, this is not an option for everyone, and some may have to take less productive, lower-wage jobs if bus services were unavailable.[16]

Overall, investing in bus services can provide significant economic value. Based on a selection of typical investments to improve bus services, **every £1 of public funding spent on a package of measures could generate £4.55 in economic benefits**.[17]

// FINDINGS BY AREA

Across EEH the impacts vary by area depending on factors such as:
- The extent of local bus services;
- Bus patronage; and,
- Bus employment.

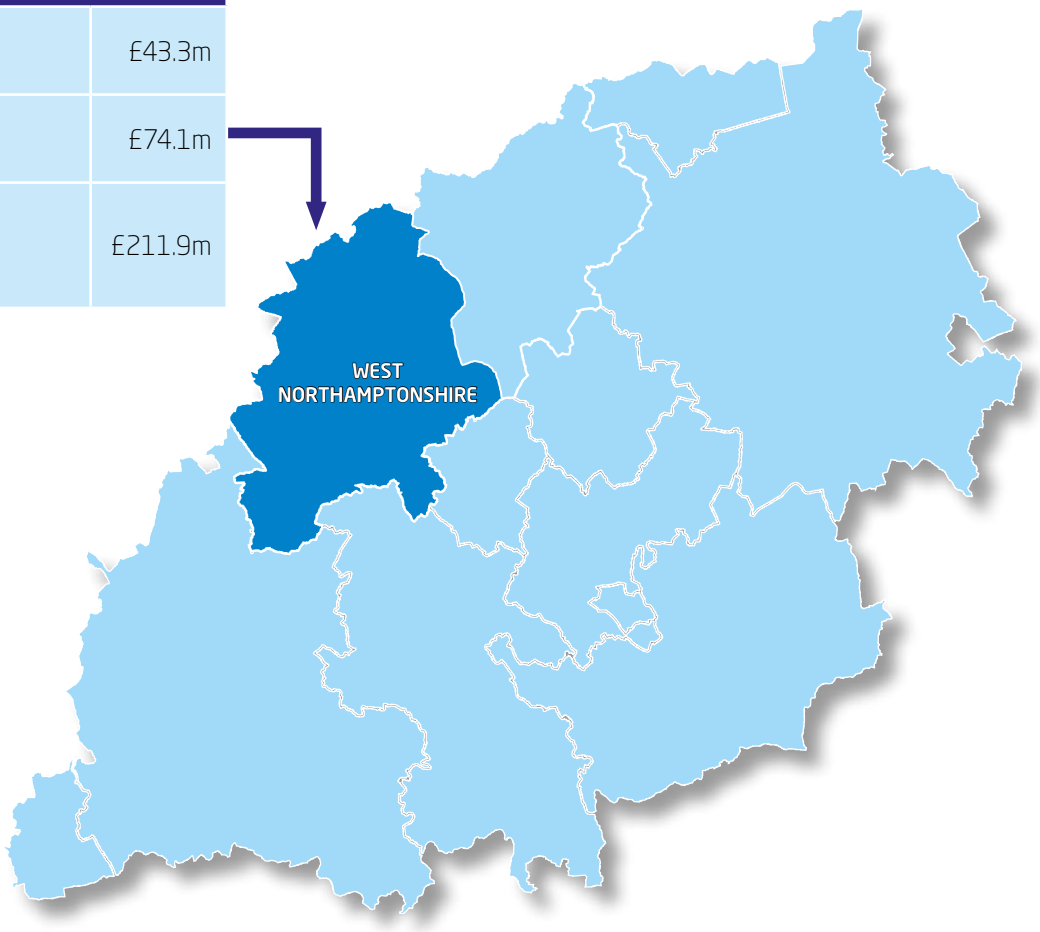
North Northamptonshire	
Lens 1 total: Economic activities of those involved in bus services	£23.0m
Lens 2 total: Economic and social activities of bus passengers	£40.9m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£70.3m



Lens 1 to 3	All values in £m	North Northamptonshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	12.3
	Supply chain impact of fleet renewal and labour impact	4.8
	Spending by employees in operations and supply chain	6.0
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	11.4
	Impacts on other road users	0.8
	Option of having buses as a mode	26.1
	Wider Societal Impacts	2.6
Economic impact of bus passengers interacting with local economies	Leisure spend	23.7
	Commuter spend	15.8
	Shopping spend	30.8

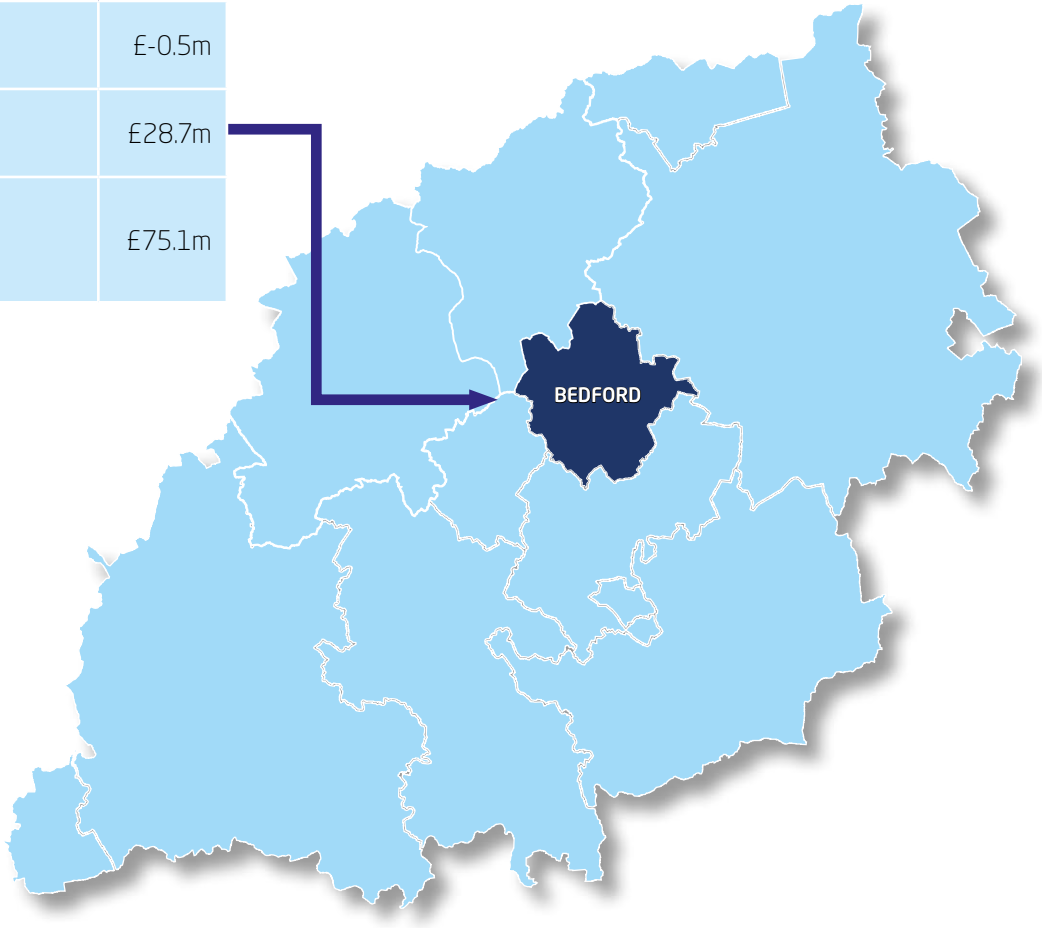
Higher bus service levels and higher patronage generate larger economic impacts from bus passengers interacting with local economies and the economic and social activities of bus passengers. Higher bus employment will generate larger impacts from the economic activities of those involved in bus services. Areas may have very low/no bus sector employment (and therefore limited impacts), not because there aren't any bus services operating within those areas but because there is no bus sector employment registered within that area i.e. the area does not have a bus depot where bus workers base themselves.

West Northamptonshire	
Lens 1 total: Economic activities of those involved in bus services	£43.3m
Lens 2 total: Economic and social activities of bus passengers	£74.1m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£211.9m



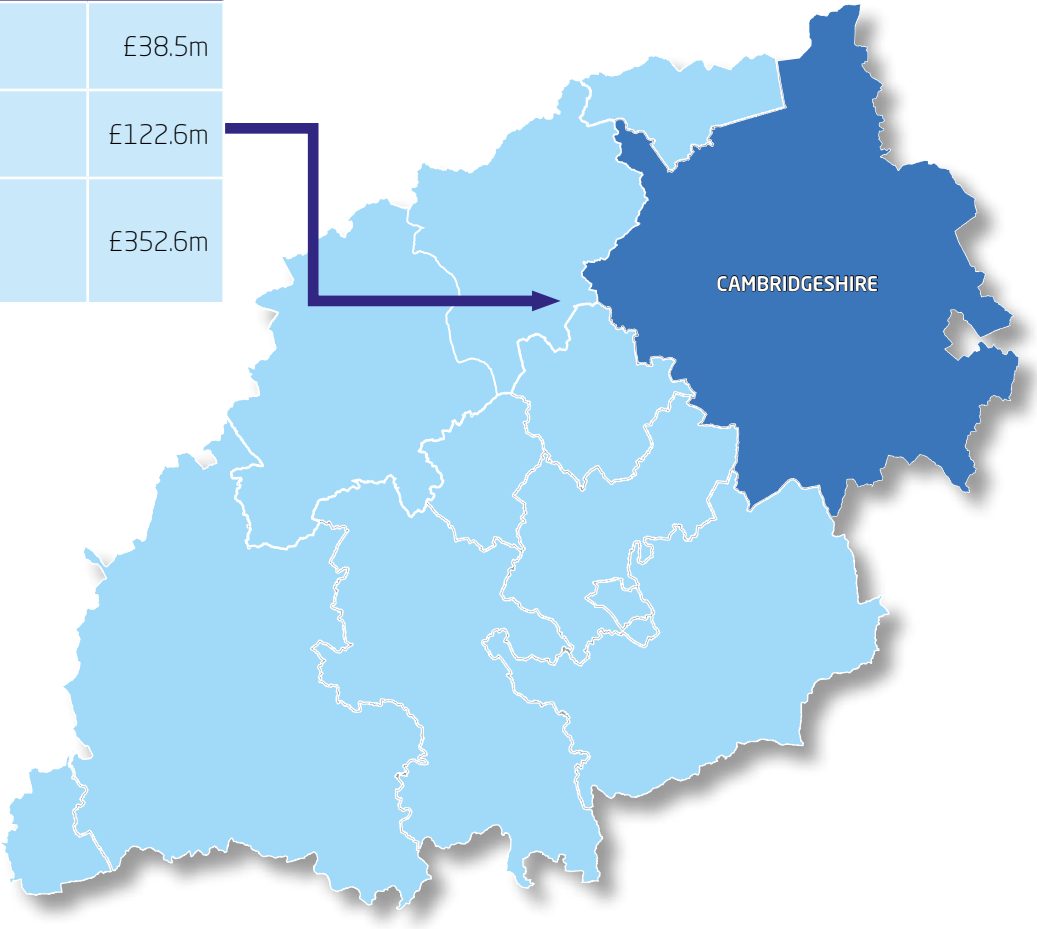
Lens 1 to 3	All values in £m	West Northamptonshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	23.1
	Supply chain impact of fleet renewal and labour impact	9.0
	Spending by employees in operations and supply chain	11.2
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	31.3
	Impacts on other road users	2.3
	Option of having buses as a mode	29.5
	Wider Societal Impacts	7.9
Economic impact of bus passengers interacting with local economies	Leisure spend	71.4
	Commuter spend	47.6
	Shopping spend	93.0

Bedford	
Lens 1 total: Economic activities of those involved in bus services	£-0.5m
Lens 2 total: Economic and social activities of bus passengers	£28.7m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£75.1m



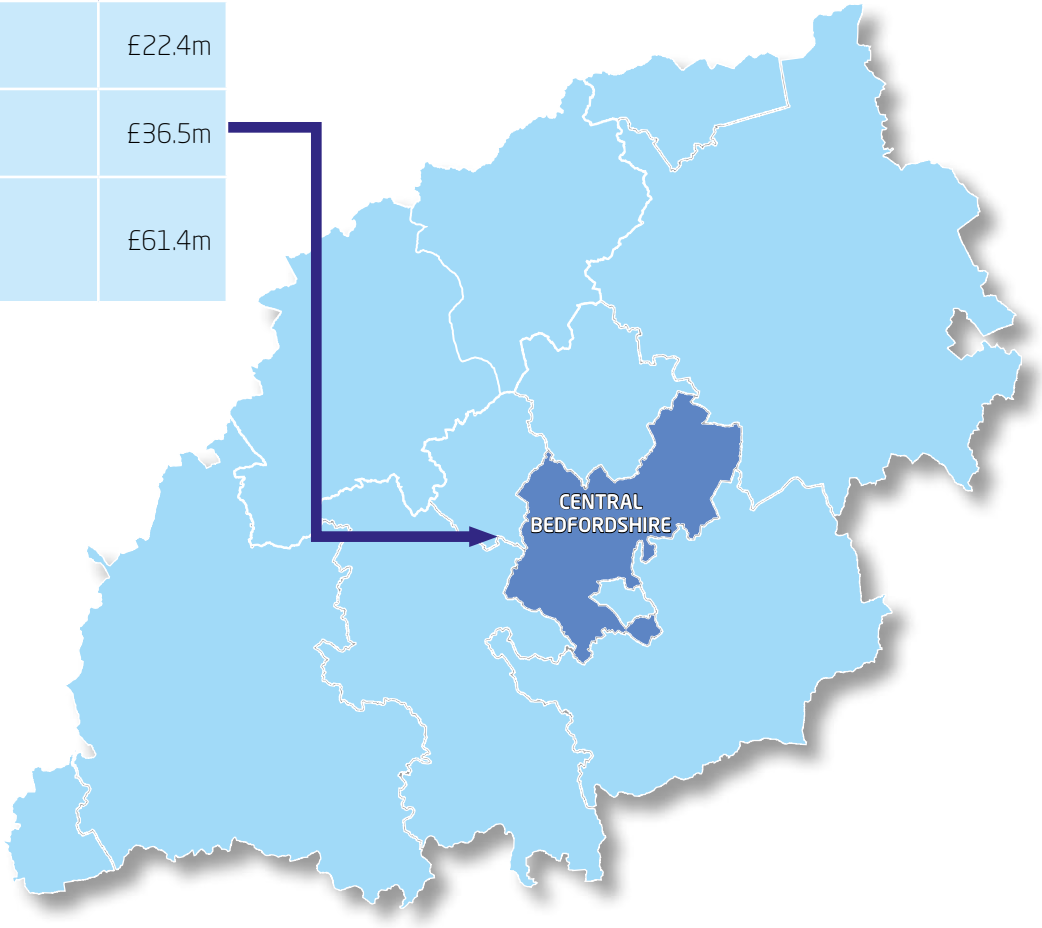
Lens 1 to 3	All values in £m	Bedford
Economic activities of those involved in bus services	Taxes, wages and industry profit	-0.9
	Supply chain impact of fleet renewal and labour impact	0.2
	Spending by employees in operations and supply chain	0.2
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	12.2
	Impacts on other road users	0.8
	Option of having buses as a mode	12.9
	Wider Societal Impacts	2.8
Economic impact of bus passengers interacting with local economies	Leisure spend	25.3
	Commuter spend	16.9
	Shopping spend	33.0

Cambridgeshire	
Lens 1 total: Economic activities of those involved in bus services	£38.5m
Lens 2 total: Economic and social activities of bus passengers	£122.6m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£352.6m



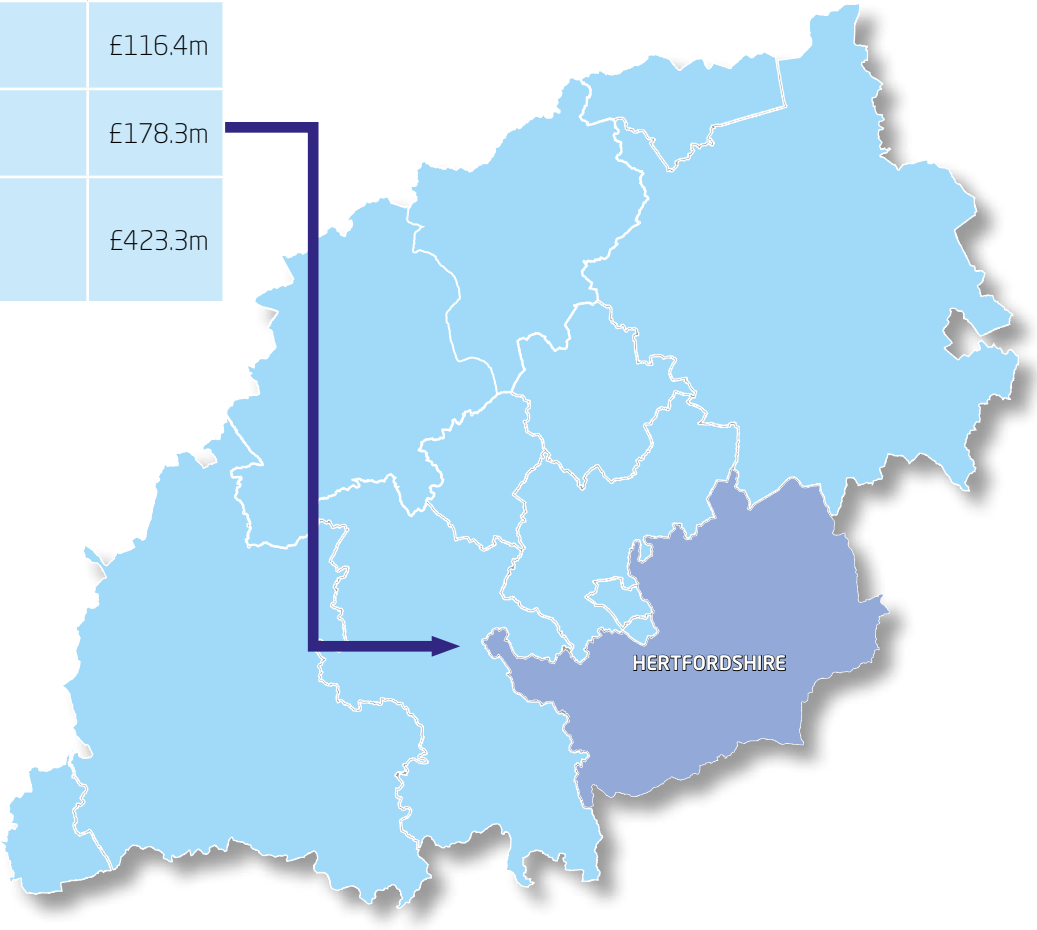
Lens 1 to 3	All values in £m	Cambridgeshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	18.5
	Supply chain impact of fleet renewal and labour impact	8.9
	Spending by employees in operations and supply chain	11.1
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	57.1
	Impacts on other road users	3.9
	Option of having buses as a mode	48.5
	Wider Societal Impacts	13.1
Economic impact of bus passengers interacting with local economies	Leisure spend	118.7
	Commuter spend	79.2
	Shopping spend	154.7

Central Bedfordshire	
Lens 1 total: Economic activities of those involved in bus services	£22.4m
Lens 2 total: Economic and social activities of bus passengers	£36.5m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£61.4m



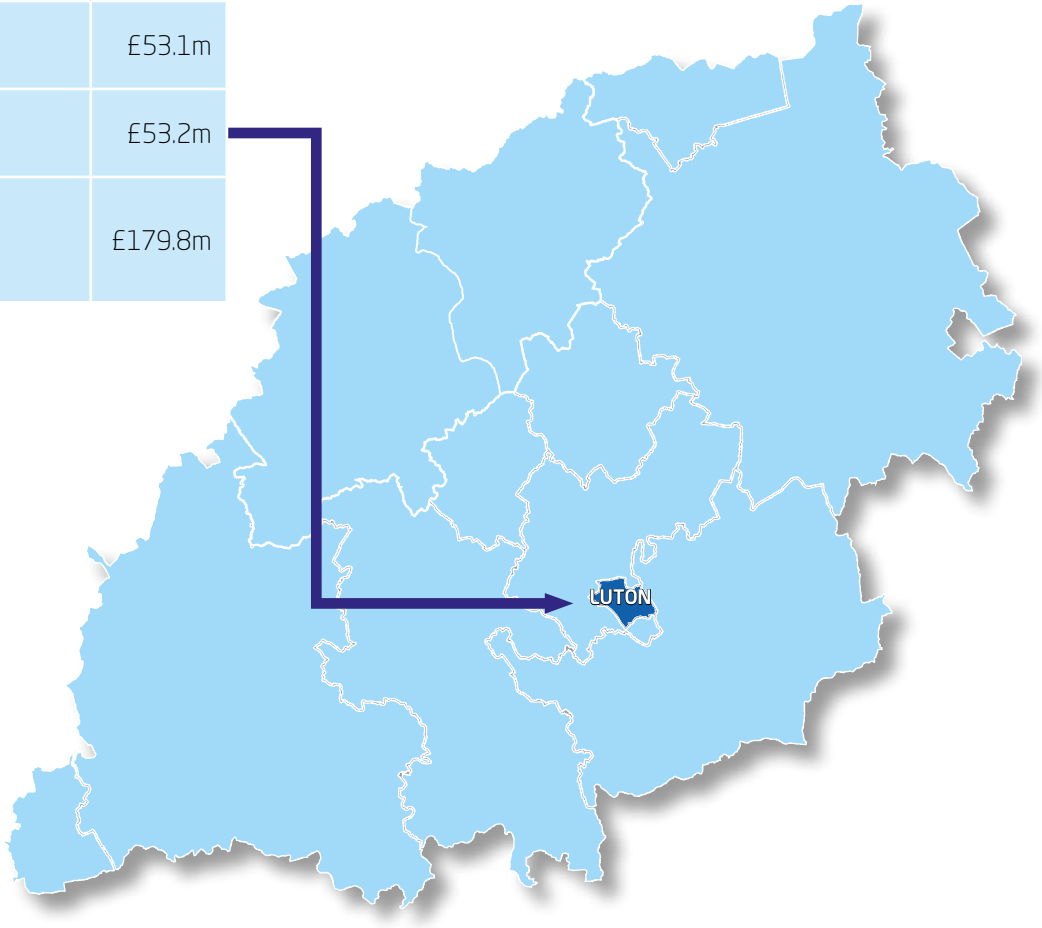
Lens 1 to 3	All values in £m	Central Bedfordshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	11.1
	Supply chain impact of fleet renewal and labour impact	5.0
	Spending by employees in operations and supply chain	3.2
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	10.0
	Impacts on other road users	0.7
	Option of having buses as a mode	23.6
	Wider Societal Impacts	2.3
Economic impact of bus passengers interacting with local economies	Leisure spend	20.7
	Commuter spend	13.8
	Shopping spend	27.0

Hertfordshire	
Lens 1 total: Economic activities of those involved in bus services	£116.4m
Lens 2 total: Economic and social activities of bus passengers	£178.3m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£423.3m



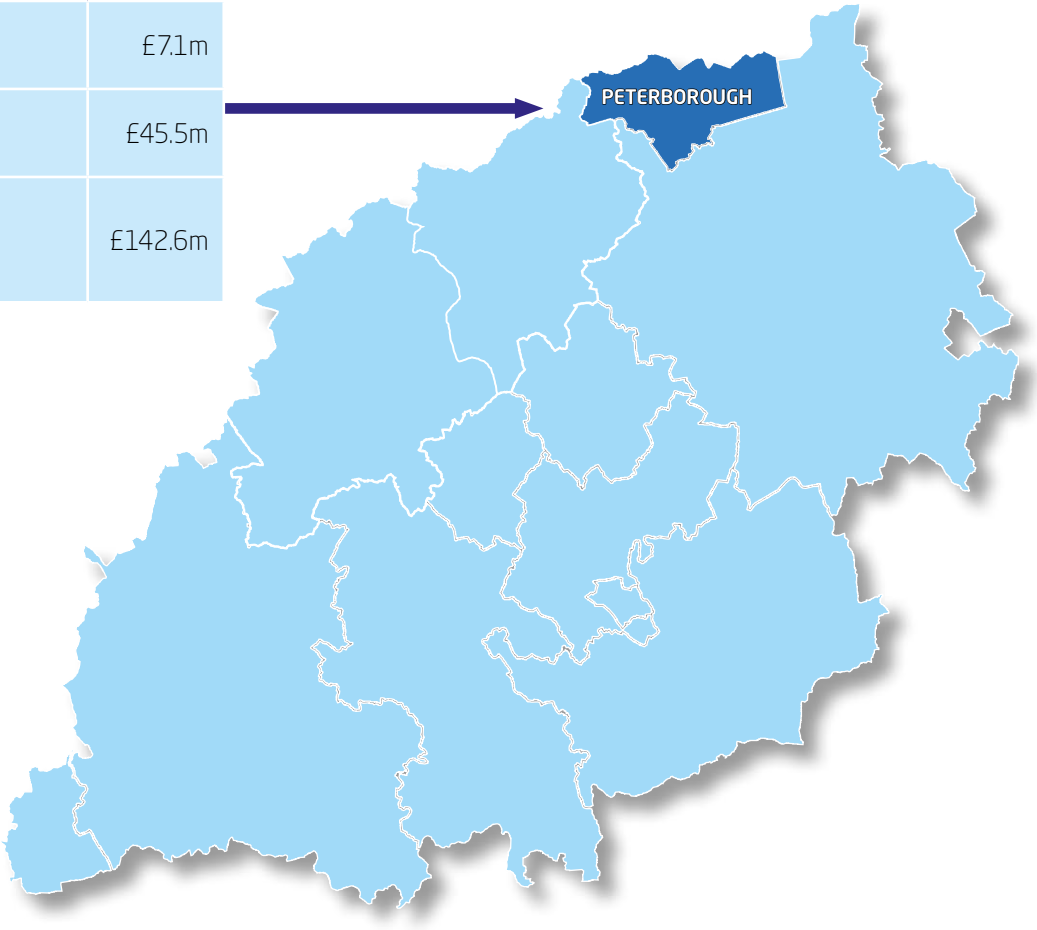
Lens 1 to 3	All values in £m	Hertfordshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	59.3
	Supply chain impact of fleet renewal and labour impact	25.5
	Spending by employees in operations and supply chain	31.7
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	68.6
	Impacts on other road users	4.6
	Option of having buses as a mode	89.3
	Wider Societal Impacts	15.8
Economic impact of bus passengers interacting with local economies	Leisure spend	142.5
	Commuter spend	95.0
	Shopping spend	185.7

Luton	
Lens 1 total: Economic activities of those involved in bus services	£53.1m
Lens 2 total: Economic and social activities of bus passengers	£53.2m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£179.8m



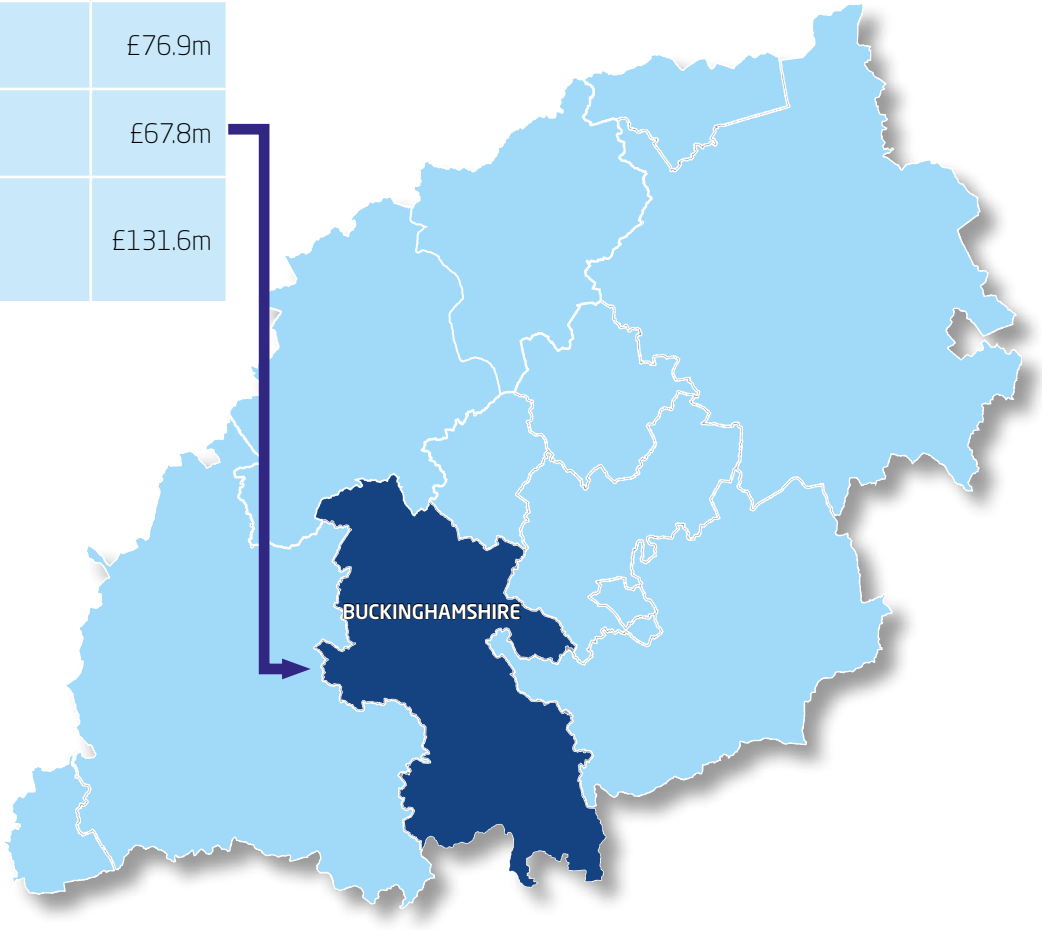
Lens 1 to 3	All values in £m	Luton
Economic activities of those involved in bus services	Taxes, wages and industry profit	28.4
	Supply chain impact of fleet renewal and labour impact	11.0
	Spending by employees in operations and supply chain	13.7
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	29.1
	Impacts on other road users	2.0
	Option of having buses as a mode	15.4
	Wider Societal Impacts	6.7
Economic impact of bus passengers interacting with local economies	Leisure spend	60.6
	Commuter spend	40.4
	Shopping spend	78.9

Peterborough	
Lens 1 total: Economic activities of those involved in bus services	£7.1m
Lens 2 total: Economic and social activities of bus passengers	£45.5m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£142.6m



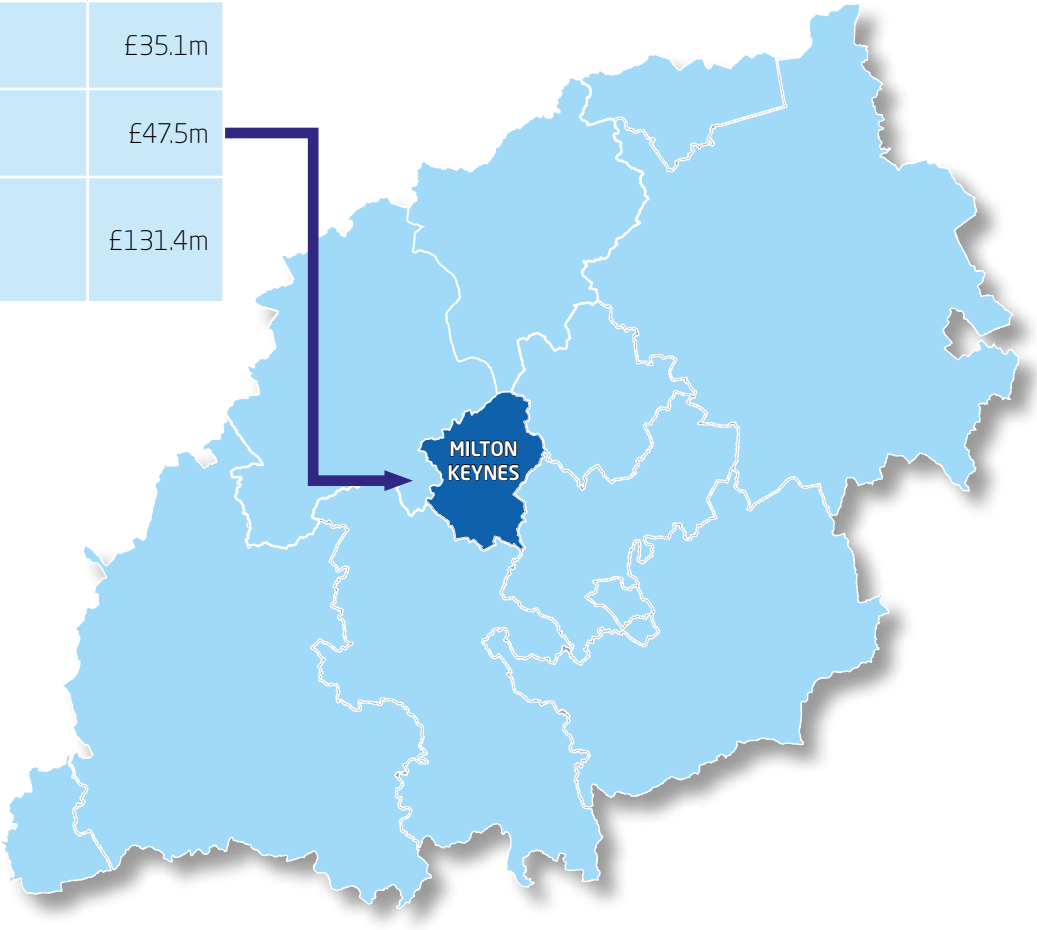
Lens 1 to 3	All values in £m	Peterborough
Economic activities of those involved in bus services	Taxes, wages and industry profit	4.1
	Supply chain impact of fleet renewal and labour impact	1.4
	Spending by employees in operations and supply chain	1.7
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	23.1
	Impacts on other road users	1.6
	Option of having buses as a mode	15.5
	Wider Societal Impacts	5.3
Economic impact of bus passengers interacting with local economies	Leisure spend	48.0
	Commuter spend	32.0
	Shopping spend	62.6

Buckinghamshire	
Lens 1 total: Economic activities of those involved in bus services	£76.9m
Lens 2 total: Economic and social activities of bus passengers	£67.8m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£131.6m



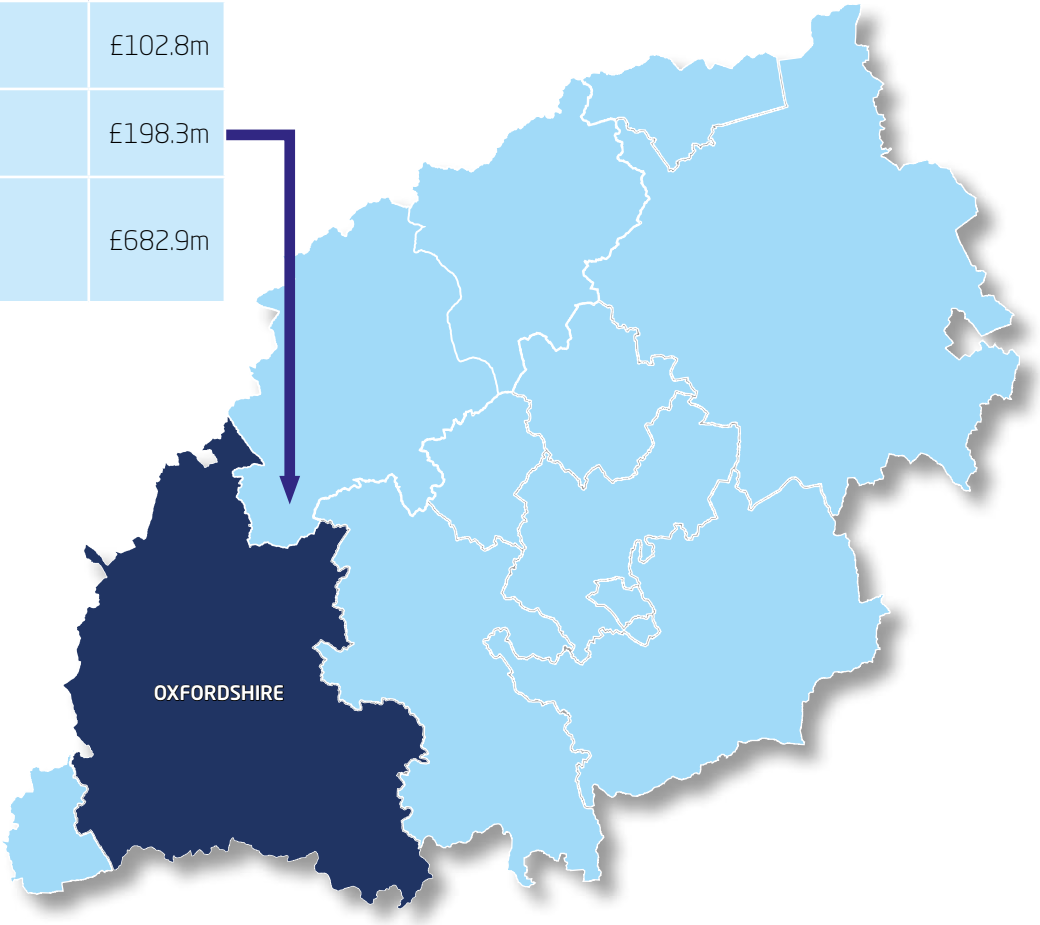
Lens 1 to 3	All values in £m	Buckinghamshire (excluding Milton Keynes)
Economic activities of those involved in bus services	Taxes, wages and industry profit	38.8
	Supply chain impact of fleet renewal and labour impact	17.0
	Spending by employees in operations and supply chain	21.1
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	21.3
	Impacts on other road users	1.4
	Option of having buses as a mode	40.1
	Wider Societal Impacts	4.9
Economic impact of bus passengers interacting with local economies	Leisure spend	44.3
	Commuter spend	29.6
	Shopping spend	57.8

Milton Keynes	
Lens 1 total: Economic activities of those involved in bus services	£35.1m
Lens 2 total: Economic and social activities of bus passengers	£47.5m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£131.4m



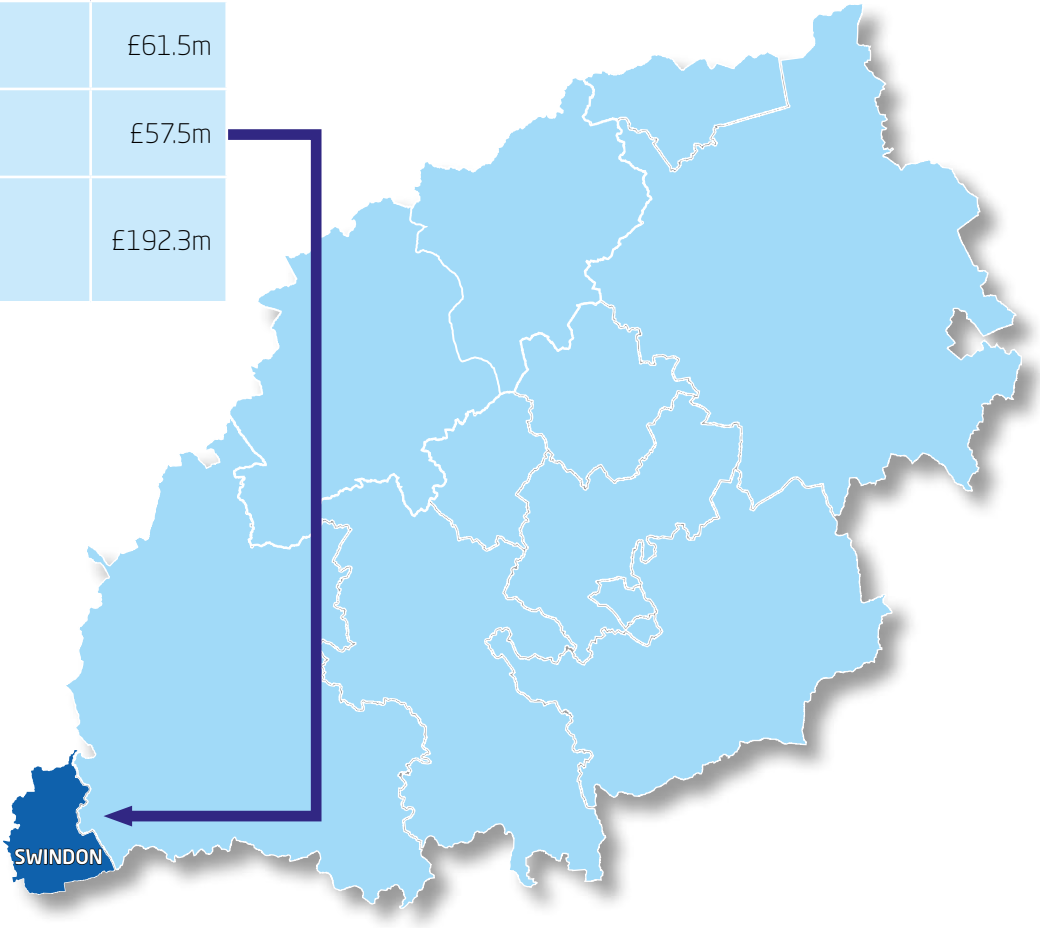
Lens 1 to 3	All values in £m	Milton Keynes
Economic activities of those involved in bus services	Taxes, wages and industry profit	18.8
	Supply chain impact of fleet renewal and labour impact	7.3
	Spending by employees in operations and supply chain	9.0
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	21.3
	Impacts on other road users	1.4
	Option of having buses as a mode	19.9
	Wider Societal Impacts	4.9
Economic impact of bus passengers interacting with local economies	Leisure spend	44.2
	Commuter spend	29.5
	Shopping spend	57.7

Oxfordshire	
Lens 1 total: Economic activities of those involved in bus services	£102.8m
Lens 2 total: Economic and social activities of bus passengers	£198.3m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£682.9m



Lens 1 to 3	All values in £m	Oxfordshire
Economic activities of those involved in bus services	Taxes, wages and industry profit	54.1
	Supply chain impact of fleet renewal and labour impact	21.7
	Spending by employees in operations and supply chain	26.9
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	110.7
	Impacts on other road users	7.5
	Option of having buses as a mode	54.7
	Wider Societal Impacts	25.4
Economic impact of bus passengers interacting with local economies	Leisure spend	229.9
	Commuter spend	153.3
	Shopping spend	299.6

Swindon	
Lens 1 total: Economic activities of those involved in bus services	£61.5m
Lens 2 total: Economic and social activities of bus passengers	£57.5m
Lens 3 total: Economic impact of bus passengers interacting with local economies	£192.3m



Lens 1 to 3	All values in £m	Swindon
Economic activities of those involved in bus services	Taxes, wages and industry profit	32.8
	Supply chain impact of fleet renewal and labour impact	12.8
	Spending by employees in operations and supply chain	15.8
Economic and social activities of bus passengers	Increased connectivity and more affordable travel	31.2
	Impacts on other road users	2.1
	Option of having buses as a mode	17.1
	Wider Societal Impacts	7.2
Economic impact of bus passengers interacting with local economies	Leisure spend	64.8
	Commuter spend	43.2
	Shopping spend	84.4

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