

Strategic Transport Leadership Board

11 July 2025

Agenda Item 3: Better Buses Update

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The value of local buses report



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

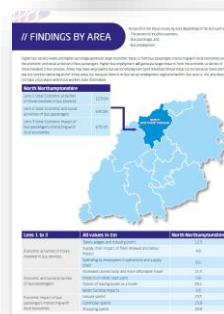


Bus passengers spend over

£2.6 billion per year on the 'High Street'

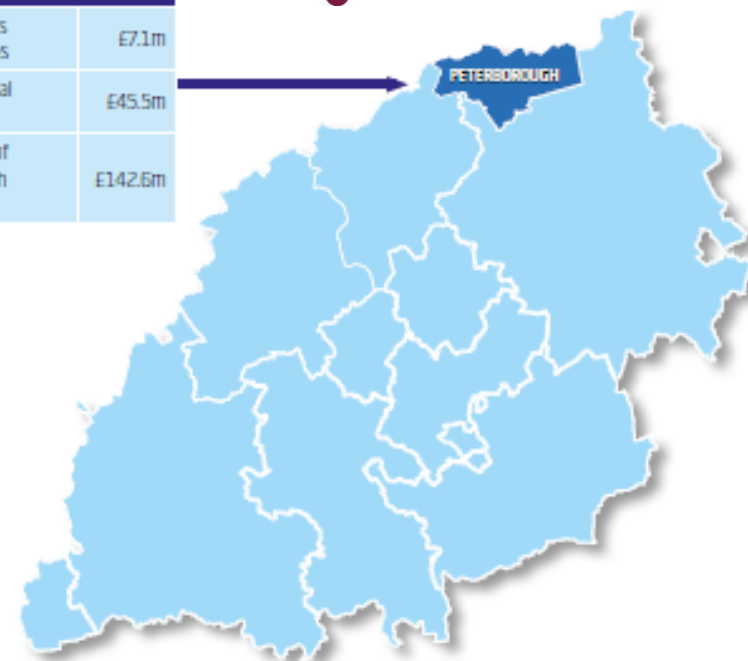


Every **£1** of public money spent on improving bus services in the region generates as much as **£4.55** in wider economic benefits



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

EEH MOBILITY Investment Prospectus

- Includes a Mobility Hubs overview (what it is, benefits, why invest etc).
- The 12 sites have background information and a range of key indices (age, education, occupation, home ownership, mode share etc).
- Location (map), listing of key transport assets, future development potential and opportunities to be included (EV points, car club bays, retail etc).
- Sites currently included:
 - Northampton Hospital, and
 - St Andrews Hospital, Northampton
 - Kettering Rail Station
 - Riverside Shopping Centre, Hertfordshire
 - Oxford Parkway Park and Ride
 - Banbury Train Station
 - Brackley, Northamptonshire
 - Didcot Parkway, Oxfordshire
 - Butterfield Business Park, Luton
 - Wellingborough Rail Station (new)
 - Buckingham Town (now approved and will be added to the final prospectus)
 - High Wycombe Rail Station (now approved and will be added to the final prospectus)
- When new and emerging mobility hub locations are agreed by authorities and transport providers, these sites can be added to the prospectus.



EEH/KPMG Mobility Hub Investment 'White Paper'

- The white paper is based upon the reflections, conversations and presentations from the 6th Feb workshop with EEH/KPMG/ LTA partners on private sector funding of mobility hubs.
- The main themes of the paper include:
 - **Integration and Accessibility**
 - **Private Sector Interest**
 - **Challenges**
 - **Proposed Solutions**
 - **Special Purpose Vehicle (SPV) Model**
- The white paper will be circulated to partners, central government (and its agencies) and the wider private sector investment community to build technical understanding of private sector financing of mobility hub delivery.



Opportunities

- Despite the risks, Mobility Hubs offer a way to improve transport infrastructure, boost economic growth, and enhance social impact. By strategically integrating them into existing systems and communities, Mobility Hubs can help create more sustainable, accessible, and vibrant urban spaces.
- **Bus franchising offers a valuable opportunity for whole-systems planning**, where Mobility Hubs could be incorporated as central elements of an integrated transport network.
 - **Including places of employment**, such as start-up or scale-up incubators, within Mobility Hubs can drive additional footfall and enhance the hubs' economic and social value.
 - **Incorporating public services**, such as healthcare, retail, and community spaces, within Mobility Hubs could improve their viability, attract businesses, and enhance social impact.
 - **Mobility Hubs could integrate into mixed-use developments, potentially with build-above options, improving both social and financial returns.** Only a small percentage of the area and cost of a new development is required to unlock a Mobility Hub, making integration highly flexible.
 - **The public sector can play a vital role in creating the right environment** for demand, helping to de-risk investments and encourage private sector involvement through active governance and seeking to foster a spin-investment environment.
 - **Local and combined authorities, and STBs, can convene and aggregate sites in a portfolio** to increase attractiveness and simplify the process of licensing.
 - **Customer incentives**, such as discounted fares, integrated ticketing, and loyalty schemes, could drive greater usage and make Mobility Hubs more attractive to commuters.
 - **Rail networks** offer the opportunity for system-wide change and the deployment of replicable Mobility Hubs from a design portfolio at many stations. The **East West Rail (EWR) line** is a live example of this opportunity with many station projects underway at which Mobility Hubs could be planned and delivered.



Key Success Factors

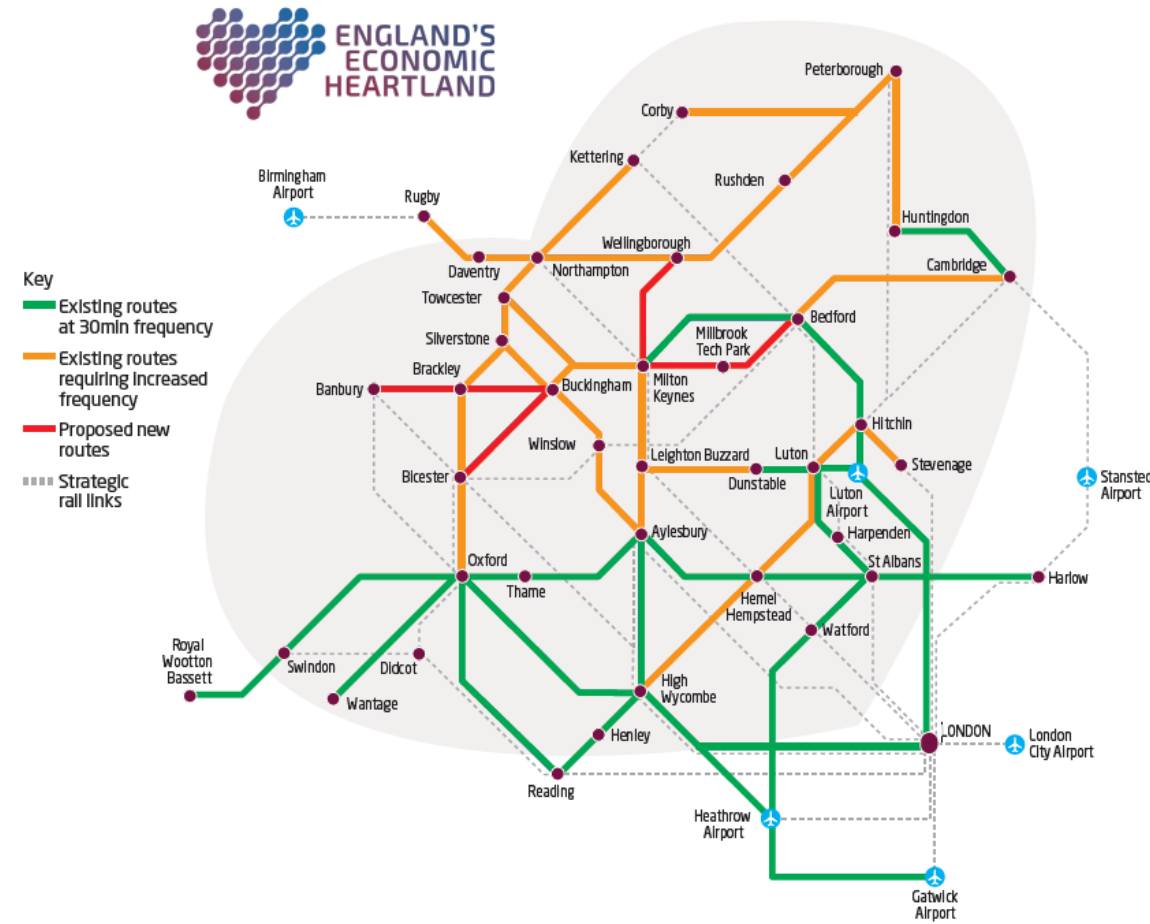
Unmarining workshop discussions, and inputs from both public and private sector perspectives, the table below uses a 'What-Should-Could' framework to show which features Mobility Hubs Must, Should, Could and Won't have in order to succeed.

Must	Should
<ul style="list-style-type: none"> • Be attractive, functional, and well integrated within the wider transport ecosystem. • Offer a high-quality user experience while aligning with existing and future transport infrastructure and planning strategies. • Be convenient, comfortable, safe, and accessible for a wide range of customers. • Be developed in collaboration with transport operators, including train operating companies (TOCs), bus operators, and micromobility providers (e-scooter, bike hire providers, etc.). • Be developed in coordination with landowners and developers to ensure appropriate placement and integration. • Maintain high standards of reliability, resilience, and quality to build trust and adoption. • Offer private investors a secure and valuable rate of return on investment. 	<ul style="list-style-type: none"> • Have attractive and consistent branding to reinforce user recognition and confidence. • Depend on a robust public transport backbone and multimodal access, including active travel and essential utilities. • Use integrated ticketing to combine digital and physical solutions. • Fit within a hierarchy of travel options, ensuring legibility and usability. • Integrate with new or existing property developments to provide a long-term customer footprint. • Be developed as a portfolio including larger high-yield sites alongside smaller, low-yield sites. • Integrate with new infrastructure projects such as East West Rail, hospital expansions, and new town developments.
Could	Won't
<ul style="list-style-type: none"> • Support local businesses and large employers through Travel Plans, Scope 3 carbon reduction, and commuting solutions. • Express a place-based attitude to design and operation, even if embedded within a broader network of hubs. • Support Demand Responsive Transport (DRT) and Connected & Autonomous Vehicles (CAVs), particularly in rural and suburban locations. • Either be deployed as a network from the outset or built out progressively from individual sites. 	<ul style="list-style-type: none"> • Have antisocial behaviour which deters usage and lowers value. • Have unclear governance or risk management processes, either in the short term or long term – which damage or limit confidence of private investors. • Have poor quality design or installation which undermines the concept. • Require private investors to engage separately with dozens of public authorities to achieve permissions.



Heartbeat Network Update

- The Heartbeat regional bus network concept aims to set out how you can better connect transport hubs and key destinations within region, whilst also looking to enhance local journeys within the existing bus network, by making the case for further investment in local bus services.
- Following EEH Board approval in December 2024, of the Stage 1 report, further work has been undertaken to set out the viability and funding required to deliver the network concept.
- Neil Davies, Senior Bus and Rail Planning Specialist from AtkinsRéalis will present a update on the Stage 2 work.



EEH Heartbeat Network

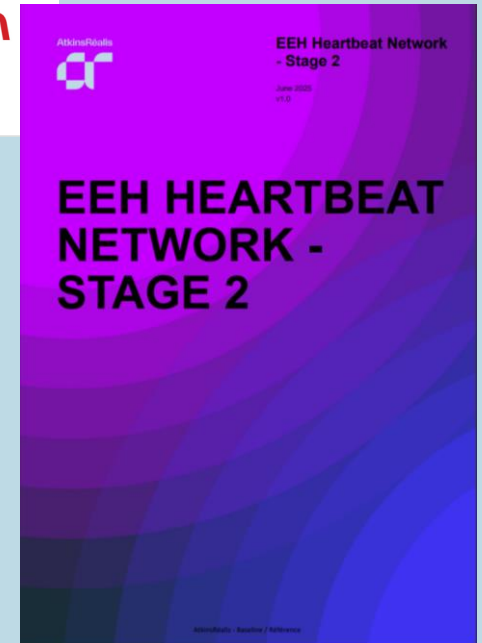
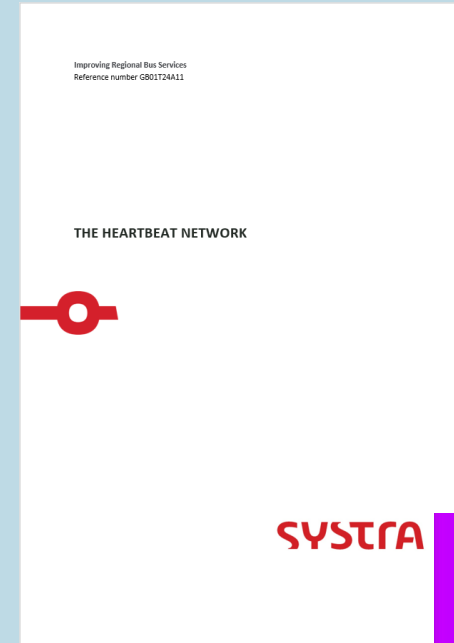
Stage 2 Report

11/07/2025

Introduction

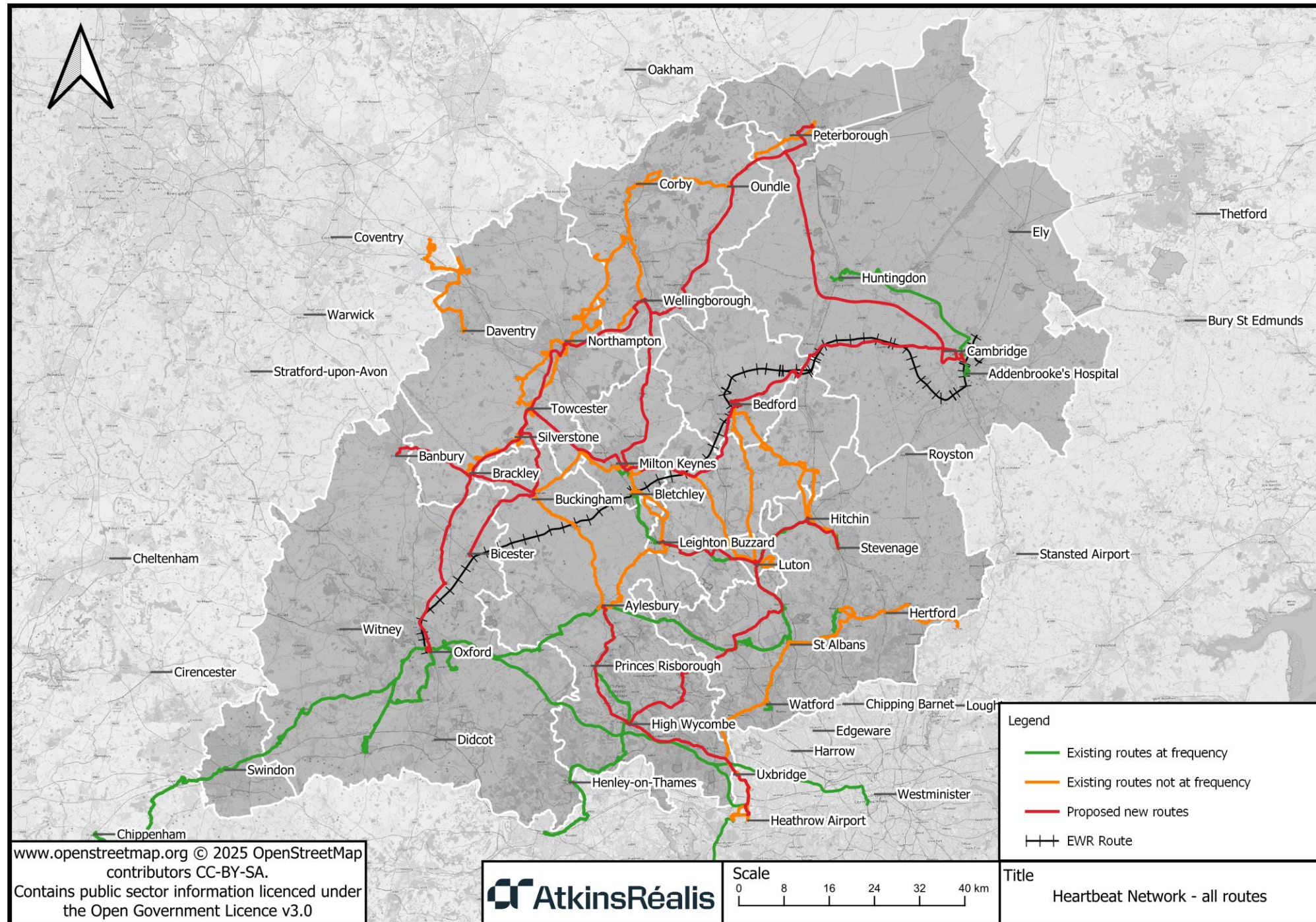
- Follows on from the Stage 1 report which was agreed by EEH Board December 2024
- Stage 1 report identified a number of routes to form the 'Heartbeat Network' concept, splitting these out as:
 - 15 routes currently operating at frequency (at least every 30 minutes);
 - 10 existing routes but not at frequency; and
 - 11 suggested new routes.
- Total of 36 routes across the 3 categories.

Heartbeat Network does not seek to replace successful existing routes, but rather to enhance them by making the case for investment to improve frequency, as well as where feasible, providing the links that have been identified as missing in previous EEH studies, particularly the Connectivity Studies and Regional Bus Study.



Heartbeat Network

- 15 existing routes at frequency (30 minutes or less)
- 10 existing routes but not at frequency
- 11 suggested new routes



Stage 2

The draft of the Stage 2 work has been shared with your officers as part of EEH Regional Bus Forum for comments and inputs, these will be included in final draft of the report.

Stage 2 development has included:

- Route identification for the 11 new services, including catchment, cost and revenue estimates. Assessed using an AtkinsRéalis developed operational cost model
- Service scoring framework using five metrics to assess the potential viability of a service:
 - Local Authority bus trip rate
 - Cost per passenger
 - Cost per head of catchment population
 - Competing services
 - Congestion
- Possible integration with EWR and Universal Studios.
- User perspectives to show the impact of the Heartbeat Network on those who live, work and travel across the region.
- Potential delivery options.

Assessing the routes

The work to date has not been a demand study but previous work identified some demand. The studies have also highlighted gaps in the bus network across EEH.

There are key opportunities to link in with EWR and Universal, as well as committed major developments across the region.

New routes:

- Route 1: Northampton – Oxford
- Route 2: Banbury – Brackley – Buckingham – Bicester
- Route 3: High Wycombe – Hemel Hempstead – Luton
- Route 4: Wellingborough – Milton Keynes – Towcester – Silverstone – Buckingham
- Route 5: Northampton – Towcester – Brackley – Oxford
- Route 6: Northampton – Wellingborough – Rushden – Peterborough
- Route 7: Leighton Buzzard – Luton – Hitchin – Stevenage
- Route 8: Bedford – Millbrook Technology Park – Milton Keynes
- Route 9: Aylesbury – Princes Risborough – High Wycombe – Heathrow
- Route 10: Milton Keynes – Millbrook Technology Park – Bedford – Cambridge
- Route 11: Peterborough - Cambridge

Next Steps for the Stage 2 Heartbeat Network

- Considering feedback from LTAs and Bus Operators on the feasibility and support for the new services, how viable / how they could be delivered etc.
- Coordination of the delivery of Heartbeat network enhancements would require the support and agreement by LTAs and their Bus Operators, particularly in helping to identify and bring together funding opportunities to help deliver the network.
- Engage with LTAs to understand if EEH support would help progress the service options.
- Continue engaging with DfT regarding broader support for regional initiatives such as Heartbeat network.
- EEH will present the final Stage 2 report to the Bus and Integration Symposium in autumn/ winter 2025.

Next Steps Better Buses



- EEH is proposing to hold a further EEH Bus and Integration Symposium in autumn/winter 2025, with a wider agenda to include integration with rail and other modes. Details on agenda, venue and exact date will be shared in due course.
- Continue to work with officers from our partner authorities to further progress the buses programme with further reports and project updates to be presented to the EEH Bus and Integration Symposium 2025.
- Building on our role to enhance interurban and cross boundary bus services, EEH is keen to support Central Bedfordshire, Luton Borough and Bedford Councils with their ambition of developing a Bedfordshire wide bus plan to consider their current and future demand for bus services. A further update on the plan will be presented at the Bus and Integration Symposium 2025.

