



**TRANSPORT
SCOTLAND**
CÒMHDHAIL ALBA

Scottish Transport Statistics 2021

Bus and Coach Travel

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1. Introduction

1.1 This chapter provides information on bus and coach travel, such as the numbers of passenger journeys and vehicle-kilometres, passenger receipts and local bus fare indices, the numbers of vehicles of various types and the numbers of staff employed.

1.2 Estimates of passenger numbers, receipts and fares are based on a survey by the DfT and are therefore subject to sampling error. Figures from 2004-05 onwards are based on an improved methodology and may not be directly comparable with previous years. See the bus and coach section of the user guide.

Transport and travel habits in Scotland were profoundly affected by the Covid-19 pandemic, with restrictions on travel and daily activity in place for large parts of 2020.

Key points

- **127 million journeys were made by bus in 2020-21. This is a decrease of 65 per cent on 2019-20. Almost two fifths of these were made under the National Concessionary Travel Scheme.**
- **There were 1.5 million people with National Concessionary Travel cards in Scotland in 2021.**
- **The bus industry received £340 million in funding from local or central government in 2020-21. Passenger revenue in 2020-21 stood at £131 million in Scotland.**

2. Main Points

Vehicles and Passengers

2.1 Around 127 million passenger journeys were made by bus in Scotland in 2020-21. This is a decrease of 65 per cent on 2019-20 and a 74 per cent fall from a peak in 2007-08. Journeys under the National Concessionary Travel Scheme make up almost two fifths of this figure (38%). (*Table 2.2a*)

2.2 The distance covered by local bus services (expressed in terms of 'vehicle kilometres') can be seen as a measure of bus service provision. Although this dropped in 2020 by 24%, this was a much smaller drop than the decrease in passenger numbers (65%). (*Table 2.3a*)

2.3 The number of buses in operators' fleets decreased by 13 per cent since 2015-16 and there was a 23 per cent decrease in the number of staff employed in the industry over the same period. (*Table 2.1a and 2.4*)

2.4 Passenger journeys in Great Britain fell by 66% and Scotland by 69% over the past five years. Vehicle kilometres in both Scotland and Great Britain fell by 24% over the same period. (*Table 2.2a and 2.3a*)

2.5 The declining trend in bus use contrasts with train travel in Scotland. Train accounts for only a quarter of the passenger journeys made by bus, but saw steady increases in passenger numbers over the years leading up to the Covid-19 pandemic. (*Table SGB1*)

2.6 Bus travel in the South West and Strathclyde and South East (corresponding to the Regional Transport Partnership areas of SPT, SWestrans (Dumfries and Galloway) and SEStran) accounts for 83 per cent of bus journeys in Scotland. (*Table 2.2b*)

2.7 Bus use is higher in urban areas and lower in rural areas. The Scottish Household Survey travel diary shows 42 per cent of those who used the bus the previous day lived in large urban areas compared to three per cent of users living in accessible rural areas. (This compares to population estimates of 35% living in large urban areas and 6% living in remote rural areas.) These figures are supported by the results of the more general question on bus use included in the Transport and Travel in Scotland publication which shows 21 per cent of respondents in large urban areas had used the bus in the last month compared to 4 per cent of those in accessible rural areas. (*Table 2.10*)

Operator revenue

2.8 Bus operators in Scotland received £472 million in revenue in 2020-21, a decrease of 29 per cent on the previous year. Adjusting for the effects of inflation, total passenger revenue was 40 per cent less than 5 years ago, with the bulk of this drop in the last year. (*Table 2.8*)

2.9 In 2020-21, almost three quarters (£340 million, 72%) of operator revenue came from local or central government: through concessionary travel reimbursement, Bus Service Operators Grant (BSOG) or supported services. In the year previous, government support only accounted for 49% of operator revenue. Passenger revenue (i.e. ticket sales to non-concessionary passengers) accounted for around 28 per cent of operators' revenue (£131 million). Additional non-revenue support is excluded from these figures, specifically the Scottish Green Bus Fund and the Bus Investment Fund. (*Table 2.8*)

2.10 In real terms (adjusting for the effects of inflation), funding from local and national government is now 2 per cent lower than five years ago and overall passenger revenue is 40 percent less than it was 5 years ago. When looking at these figures it is necessary to consider the passenger number figures in Table 2.2a and the fares data in Table 2.5. Understandably, passenger revenue has been

severely affected by the drop in bus use in 2020-21, although fares have increased by 6 per cent above general inflation over the same period. (*Table 2.8, 2.2a and 2.5*)

Fares

2.11 Bus fares in Scotland have increased by 6 per cent in real terms (adjusting for the effects of inflation) over the past five years, while the increase for Great Britain was 3 per cent. In current prices, i.e. viewing fare increases in the way that a consumer would, fares have risen by almost 16 per cent over the past five years. The increase in current prices is higher than in Great Britain as a whole which has seen an increase of 12 per cent over the last five years. (*Table 2.5*)

Operator costs

2.12 As would be expected with the significant drop in passenger numbers and smaller drop in service provision (as reflected in vehicle kilometres), operator costs per passenger journey increased significantly in 2020-21. In 2020-21 operating costs per passenger journey more than doubled (increasing by 167 per cent) from £1.96 per passenger journey to £4.49. Although the operating costs per vehicle km is lower than for the rest of GB (excluding London), operating costs per passenger journey remain higher in GB (£4.49 in Scotland, compared to £4.20 for GB excluding London). See also 'Other sources of data', as more detailed costs data is available from the Confederation of Passenger Transport. (*Table 2.6 and 2.7*)

Passenger Satisfaction

2.13 In 2019, the majority of people were satisfied with most aspects of bus services that the Scottish Household Survey asked them about (the relevant questions are currently included in the survey every second year). At least three quarters of respondents were satisfied with the extent to which buses ran to timetable; the cleanliness of buses; bus service is stable and not regularly changing; the ease of finding out route and timetable information; feel safe/secure on bus during day; and the simplicity of deciding which ticket they need. (*Table 2.11*)

2.15 Respondents gave lower satisfaction scores for the extent to which buses were environmentally friendly (56%) and whether the fares were good value (55%).

2.16 Additionally there was a noticeable difference in those who felt safe on the bus during the day and in the evening. Ninety-three per cent of respondents agreed that they felt safe using the bus during the day compared to 69 per cent in the evening.

Concessionary Travel

2.17 The National Concessionary Travel Scheme for older and disabled people was rolled out across Scotland in April 2006. The scheme enables individuals aged 60+ or those with a disability (who meet certain criteria) to travel free on buses across Scotland. In some local authorities the card can be used on trains and ferries. There is also a scheme for young people, The Young Scot Card. Those aged 16-18, or full-time volunteers aged under 26 can use the card to get a third off adult single fares on bus services in Scotland, a third off rail travel and two free journeys to the mainland for islanders. 149,000 young people were eligible to access the travel concessions available through their Young Scot card in 2020. The young persons scheme is excluded from the analysis in paragraph 2.19 and 2.20 but is included in table 11.29. (*Table 2.13*)

2.18 Ninety per cent of young people (16-18) had a concessionary fare pass under the Scheme in 2021, and 94 per cent of those aged 60 or over had a pass. These proportions have changed little over the period since the introduction of the national scheme, though there has been a steady increase in pass holder numbers over the period. (*Table 2.12 and 2.13*)

2.19 The majority of pass holders (90%) in the older and disabled persons scheme hold a pass on the basis of age. Of those who have a pass for the disabled or visually impaired, 78% have a companion card which allows someone to travel with them on the bus. Card holder numbers by local authority are shown in Table 2.14. (*Table 2.13*)

2.20 Details of trips made on buses under the National Concessionary Travel Scheme are included in Table 2.2a. Further details of journeys made on all modes of transport under the National Schemes and current and previous local schemes are shown in table 11.29. Bus journeys account for almost all (98%) of journeys made under the concessionary travel scheme. See the personal and cross modal travel section of the user guide for more detail around what is included in this table.

Other sources of data (not National Statistics)

2.21 Some industry data are available, though as they are not produced by Government they are not National Statistics and do not comply with the Code of Practice for Official Statistics. They are included here as an alternative information source which may be of interest to readers.

2.22 The Confederation of Passenger Transport (CPT) publish a Cost Index on their website. This shows that wages, staffing and labour accounted for around 60% of

operating costs, with fuel accounting for 16%. Total costs have been above inflation for the last few years.

2.23 The Office of the Traffic Commissioner are responsible for the licensing of the operators of buses and coaches and the registration of local bus services (routes). Statistics are published in the Traffic Commissioners' Annual Reports. There were 27 cases of action taken at public inquiry for non-compliance (under the Public Passenger Vehicles Act 1981) in Scotland in 2017-18, sixteen more than in 2016-17.



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Published by Transport Scotland, March 2022

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