



National Bus Strategy: Social Value

Resources guidance for maximising accessibility, inclusivity and equality of opportunities for existing and potential bus users

About this Guide

This Master Guide aims to equip you with the key concepts and resources to feel confident in talking about Social Value through buses and to provide recommendations on delivery. It covers:



**Note that much of the content of this guidance uses publicly available guidance and material published by DfT and other relevant organisations.*

Defining Social Value

Through the planning and delivery of transport infrastructure and services we should naturally aim to maximize the ‘delivering value to society’. However, **‘delivering value’** is not a straightforward concept, as this **will mean something different in each context and to the various groups** that have a stake in the planning, delivery, operation and use of transport networks.

As a starting point, this programme has established the following definition to guide our activities:

Social Value in the BSIP programme focuses on **maximising accessibility, inclusivity and equality of opportunities for the full range of existing and potential bus users**. We will achieve this by working with our staff and industry to embed these considerations throughout our work.



Why is Social Value Important to us?

Our moral and legal duty

Through the delivery of public work in transport, we need to keep in mind alignment with wider policy and duties including:

Public Sector Equality Duty (Equality Act 2010)	Public Services (Social Value) Act (2013)	Procurement Policy Note (PPN) 06/20	Inclusive Transport Strategy	Disabled Persons Transport Advisory Committee's (DPTAC)
Supporting the advancement of equality of opportunity between people who share a protected characteristic and those who do not.	Requiring public bodies to look beyond the financial cost of a contract to consider how the services they commission and procure can deliver further social value in their area.	Requirement to take account of social value in the award of central government contracts.	Supporting the target for 'disabled people to have the same access to transport as everyone else by 2030'	Supporting the vision of providing disabled people the same access to transport as everybody else, to be able to go where everyone else goes easily, confidently and without extra cost.
English National Concessionary Travel Scheme (ENCTS)	Mandatory onboard travel announcements	It's everyone's journey campaign	ENOUGH campaign	<i>amongst others...</i>
Guaranteeing free travel for people over state pension age, and people with an eligible disability, on eligible local bus services anywhere in England	Requiring almost every local bus or coach service to provide audible announcements and visual displays.	Championing equal access on public transport (with a particular focus on disabled groups).	Supporting the goal to end of violence against women and girls, including in public transport.	

Why is Social Value Important to us?

Our moral and legal duty

People with particular protected characteristics often travel more by public transport and are more reliant on it

- In 2017 across England, a third more women than men travelled by bus (WBG, 2018)
- In 2022, 17-20yrs made significantly most trips by local bus as main mode than any other age groups, with an average of 68 bus trips compared to the 23 average for all ages (NTS0601).
- Non-white people make twice as many public transport trips than white people (NTS, 2021)
- White people are more likely to have access to a car. 85% vs 76% by non-white in 2022. The difference is highest when comparing to 68% for Black, Black British, Caribbean or African households (NTS0707)
- 41% of the 512 blind and partially sighted participants from a survey conducted by RNIB in 2022 said they often use public transport to make their journeys. Buses was the most popular mode with 37% participants reporting they often used it. This is even higher than for taxi, 25%.
- There are around 9m concessionary bus travel passes in England, used by older and disabled users. (DfT, 2023)



Why is Social Value Important to us?

Our moral and legal duty

But it can remain challenging...

- Four-fifths of disabled people say they feel some level of anxiety or stress when travelling by public transport, for key reasons including fear of enclosed spaces, behaviour of other passengers and possibility of missing connections. (REAL training, DfT)
- When looking at sex and age together, 58% of women aged 16 to 34 years reported feeling very or fairly unsafe using public transport alone after dark. One in two had experience a form of harassment in the past 12 months (ONS – Opinions and Lifestyle Survey, 2022)
- Public transport running infrequently and lack of accessibility (such as bus numbers not being clearly displayed) are cited as common barriers that prevent people with sight loss and partially blinded from taking public transport (RNIB, 2022)
- Lower income households make nearly 20% less trips and travel 40% less distance than the average household (NTS, 2017)
- LGBTQ+ passengers are three times more likely to encounter unsolicited sexual behaviour on London's public transport (TfL, 2012)

Ultimately leading to disadvantage



Policy and guidance



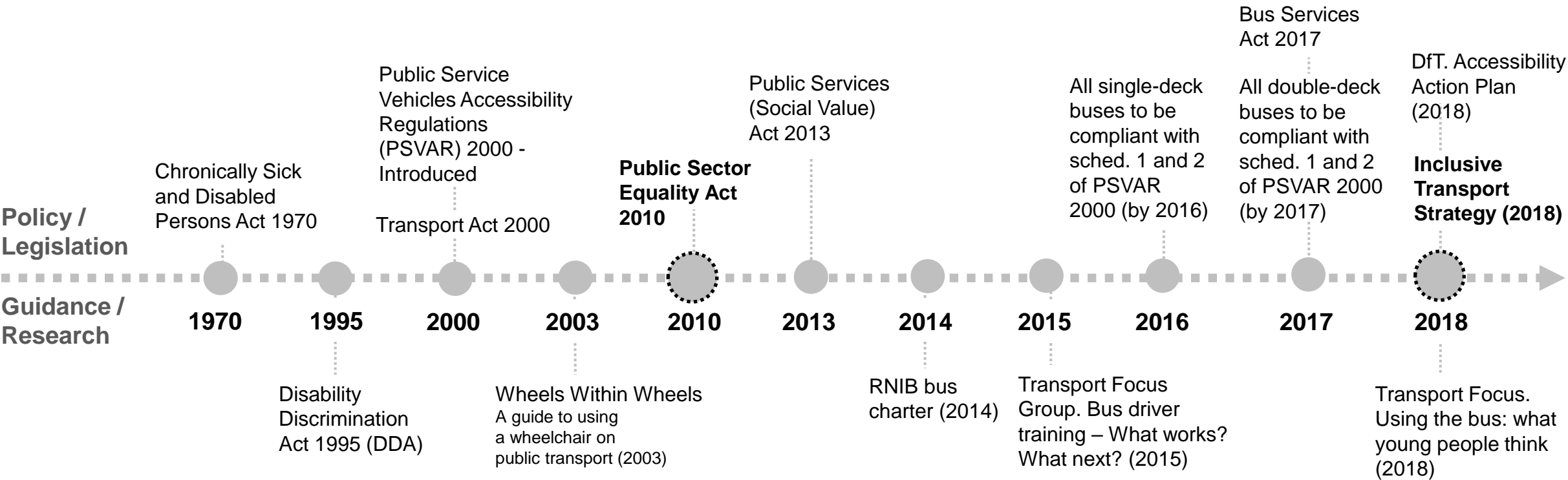
Advancements over time

Advancements over time

Key policy and guidance

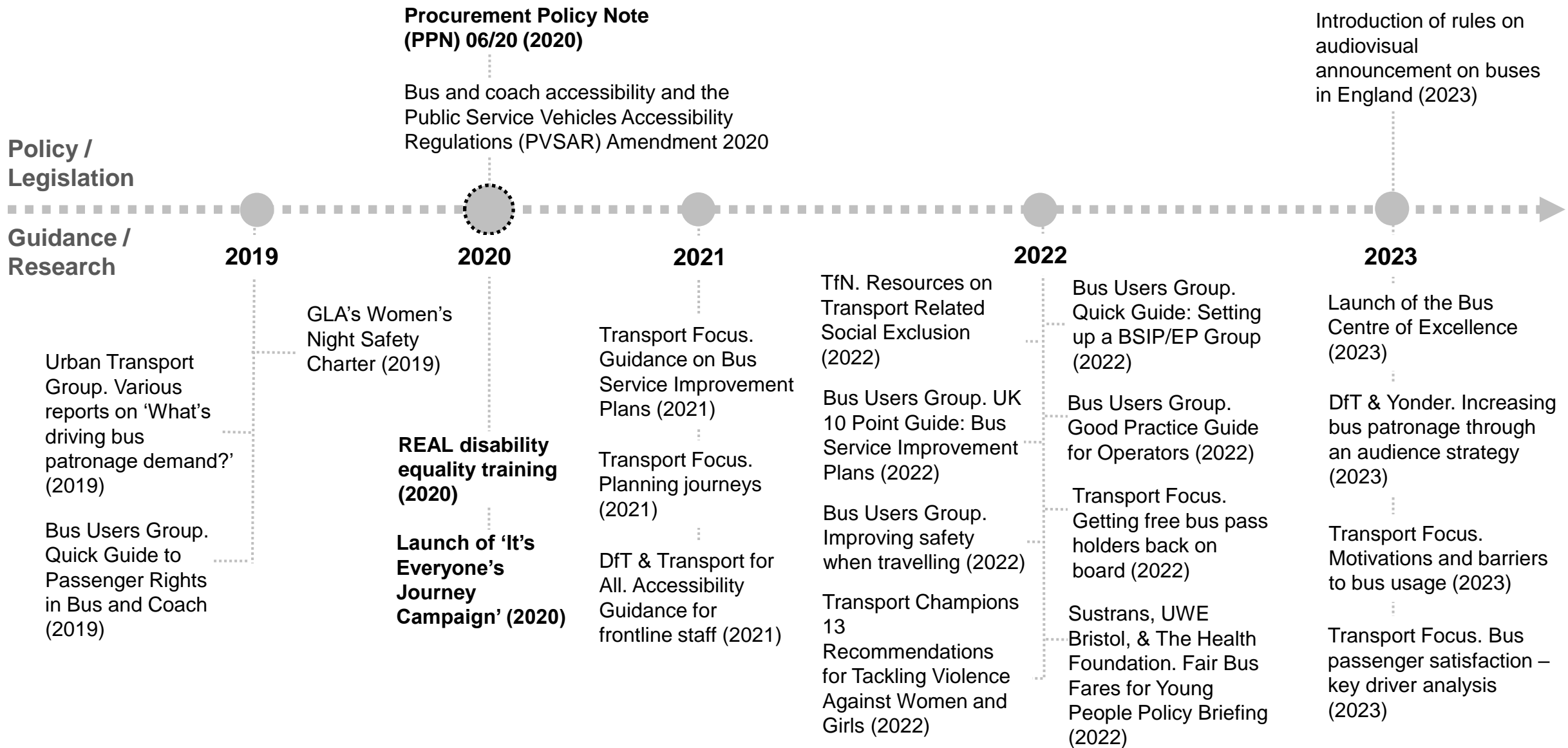
Advancements over time

The timeline below shows how Social Value has been gaining more traction within policy and legislation as well as through decentralised research and initiatives.
(and these are just a few events! A more comprehensive list of resources is included towards the end of this guide)



Advancements over time

Key policy and guidance



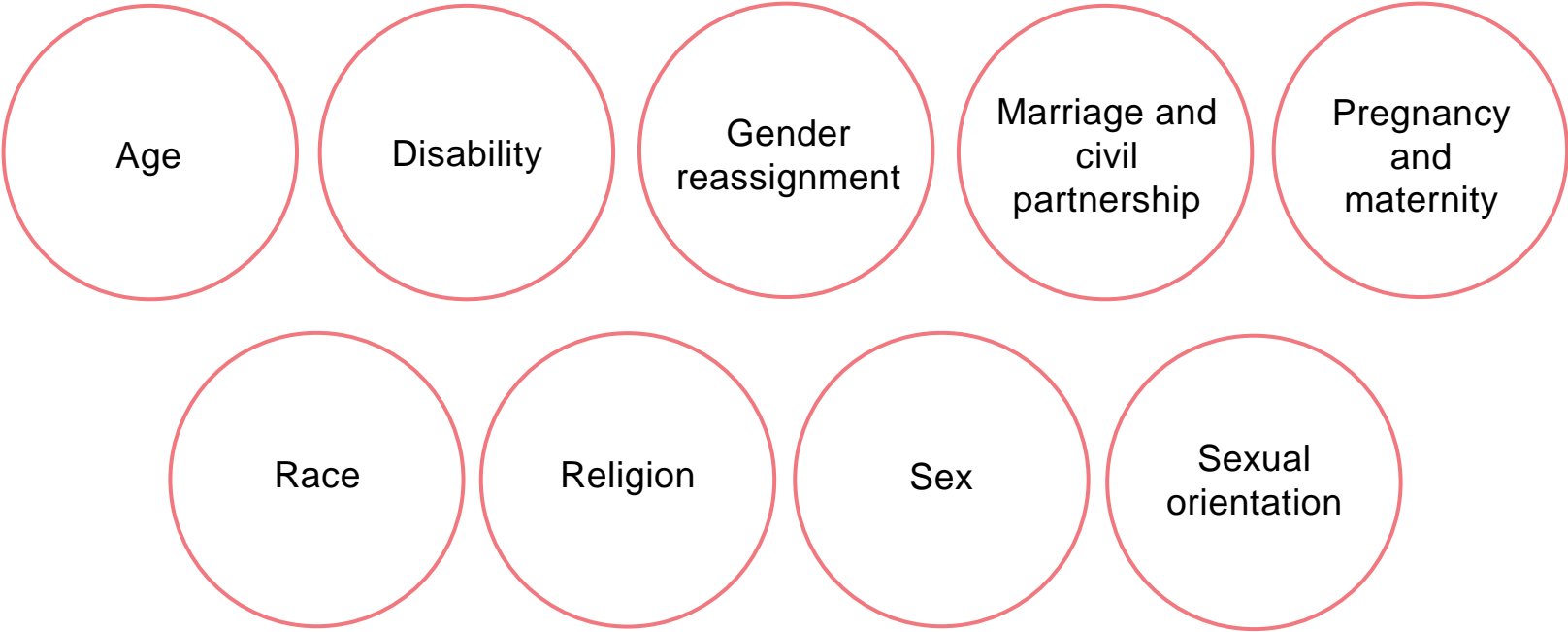
Key policy and guidance

Equality Duty

The Equality Act 2010 contains an integrated public sector equality duty, which came into force on 5 April 2011. It requires public bodies to have due regard to:

- **“eliminate unlawful discrimination,** harassment and victimisation and other conduct prohibited by the act
- **advance equality of opportunity** between people who share a protected characteristic and those who do not
- **foster good relations between people** who share a protected characteristic and those who do not”

9 Groups of Protected Characteristics:



[Link to the Equality Act 2010](#)

Equality Duty

Reasonable adjustments

The Equality Act 2010 requires service providers to make reasonable adjustments where a disabled person is put at a disadvantage in comparison with a non-disabled person. Reasonable adjustments may also be required to mitigate physical features which cause disabled people disadvantage or to provide auxiliary aids needed in order to remove disadvantage.

This duty requires Local Transport Authorities as well as transport operators to **take reasonable positive steps to ensure that disabled people can access transport services**. The use of services by disabled people must be anticipated and planned for. They should not wait until a disabled person wants to use the service before considering the responsibility to make reasonable adjustments.

[Link to the Equality Act 2010](#)

Case Study: Paulley v FirstGroup PLC

Wheelchair user Doug Paulley tried to board a bus. The driver asked him to wait, as the wheelchair space was currently taken by a mother with her sleeping child in a pushchair.

When the driver asked the woman to leave the space she refused, meaning that Mr Paulley was unable to board the bus and missed a vital rail connection.

On 18 January 2017, **the Supreme Court made a landmark ruling that bus companies must end ‘first come, first served’ policies and do more to cater for wheelchair users.**

This means that **the driver should take further steps to request a non-wheelchair user makes space for wheelchair users**, rather than just accepting that a non-wheelchair user cannot move. Bus companies should have clear policies in place and give training to drivers to help them to remove any barriers that wheelchair users face.

Actionable points:

- **Familiarise yourself with policies and training that bus operators have in place** for removing barriers that people with particular protected characteristics face. Physical accessibility is one layer, and often there will be strategies in place to minimise these. However, it will be key to identify how these relate to wider policies targeting different groups (e.g. promoting women's safety, inclusivity for people with hearing impairment, sight impairment, etc.). The development of integrated strategies that account for different forms of inclusivity is needed.

See the example of how Arriva takes steps to comply with this duty. [Link to Arriva's Inclusion Strategy](#).

Equality Duty

About disability:

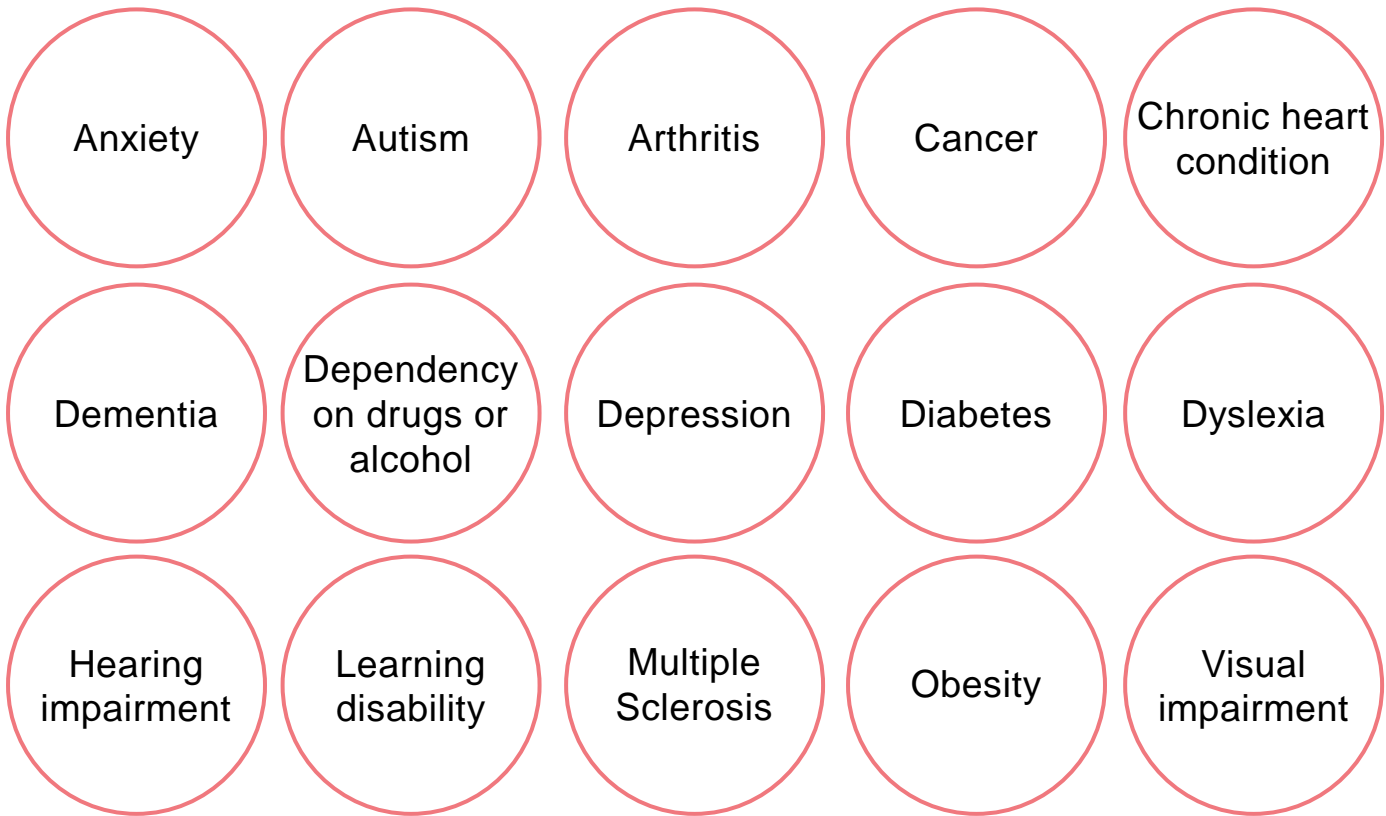
The Equality Act 2010 defines disability as anyone with **“a physical or mental impairment that has a substantial and long-term negative effect on their ability to do normal daily activities”**.

There are around 16 million people in the UK living with an impairment. That’s 24% of the total population, who are also more likely to encounter transport barriers unless their rights and needs are respected.

Disability is not an abnormal condition but rather an evidence of human diversity. Hence the importance of ensuring services, employment and society work for everyone.

[Link to the Equality Act 2010](#)

What can cause an impairment according to the Equality Act 2010?



*Note that not all of these will automatically mean a disability. Key to consider the ‘substantial’ and ‘long-term’ nature.

Equality Duty

Social disability:

The social model of disability is a way of viewing the world, developed by disabled people.

The model says that people are disabled by barriers in society, not by their impairment or difference. Barriers can be physical, like buildings not having accessible toilets, or they can be caused by people's attitudes to difference, like assuming disabled people can't do certain things.

The social model helps us recognise barriers that make life harder for disabled people. Removing these barriers creates equality and offers disabled people more independence, choice and control.

[Link to the Social Disability Model](#)

Examples of social disability:

“My child with dyslexia wants to read about station history shown in posters at the local station. The social model recognises that they would be able to digest the information better if it was presented in a different way, therefore using plain English and adding other elements to convey the message, such as images and diagrams.”

“I can't use stairs but want to take buses to college. The social model recognises that this is a problem with buses, not me, and would suggest using more buses with ramps.”

“I experience partial sight loss and feel confident navigating my regular bus route. However, I face challenges on unfamiliar journeys due to poorly indicated bus stops in my local area. These stops often consist of just a pole, with information too small for me to read. Unlike larger stations, finding assistance is a struggle. The social model acknowledges that is not my fault but an issue of how infrastructure has been designed”.

Public Services (social value) Act 2013

The Act:

The Social Value Act requires people who commission public services to think about how they can also secure wider social, economic and environmental benefits.

Before they start the procurement process, commissioners should think about whether the services they are going to buy, or the way they are going to buy them, could secure these benefits for their area or stakeholders.

As local authorities become increasingly financially self-reliant, it is key to consider how the limited resources can go ever further while still maintaining the quality and breadth of services.

Link to the Social Value Act

What this means for buses:

In line with these priorities, it is key to instil social value in the procurement of bus services, including socially necessary services as well as the delivery of related bus infrastructure.

The Social Value Toolkit for Councils contains the following recommendations in relation to scoring social value in evaluating bids in procurement.

Suggested Weightings			
Evaluation Criteria	Where price is important	Where quality of service is important	Where social value opportunity is high
Quality	35%	50-55%	40%
Price	50-55%	35%	45%
Social Value	10-15%	10-15%	15 – 20%

Link to the Social Value Toolkit for Councils

Measuring social value in local government procurement

A set of Themes, Outcomes and Measures (TOMs) have been developed to help councils to measure the value they are achieving through implementing the Social Value Act.

The National TOMs Framework has been designed around 5 principal issues, 20 Core Outcomes and 48 Core Measures. Detailed guidance and the calculator itself can be accessed through the links below.

National TOMs Framework Guidance

National TOMs Framework Calculator

National TOMs Framework explained in a video

PPN 06/20

Taking account of social value in the award of central government contracts

PPN 06/20 launched a new model to deliver social value through government's commercial activities. It places a requirement for Central government organisations to use this model to take account of the additional social benefits that can be achieved in the delivery of its contracts, using policy outcomes aligned with this Government's priorities.

In compliance with this Note, the Social Value workstream of this programme operates with a **special focus on the priority 4: 'Equal opportunity'**.

How can these considerations be translated into bus services?

Whilst PPN 06/20 applies to central government contracts, the principles for ensuring equal opportunity through **reducing the disability employment gap** and **tackling workforce inequality** should translate into LTAs and operators.

This is in line with Government's commitment to "increase the number of high-quality applicants available, to create a workforce that reflects the diverse range of customers it serves and the community in which it is based, and to bring additional skills to business." Considering the high public-facing nature of bus services, this considerations are highly relevant and should be addressed.

It is also timely to hold conversations around these goals as LTAs and operators seek to address employment challenges.

Actionable points:

- **Help us identify good recruitment and retention practices** at the LTA and operator level. Have you managed to measure improvements towards this? (note that this could also serve as proof of compliance with PSED).
- **Help us identify challenges** faced in relation to the recruitment and retention of a diverse workforce. This can help us shape the provision of advice.
- Consider **how investment in service improvements will contribute to advancing equality of opportunities**. Consider how you are currently measuring this, and which changes could be incorporated in further bus service planning specifically at both the strategic and economic dimensions.

[See section on 'Making the case for Social Value'.](#)

Inclusive Transport Strategy

Ambition:

“disabled people to have the same access to transport as everyone else, and to be able to travel confidently, easily and without extra cost. **By 2030, we envisage equal access for disabled people using the transport system**, with assistance if physical infrastructure remains a barrier.”

5 key themes:

- 1. Awareness of passenger rights and enforcement
- 2. Better staff training
- 3. Improving information and awareness
- 4. Inclusive physical infrastructure
- 5. Future of inclusive transport

[Link to the Inclusive Transport Strategy](#)

Specific commitments that are relevant to buses (1/2)

Ensure that transport operators and providers train frontline staff and senior management on disability awareness , involving disabled people in the development and delivery of this training wherever possible.	Continue to make clear that we expect transport regulators to take action against operators that do not make progress, pushing them to use the powers that they have to take robust action against non-compliance, and further strengthening their powers where needed.
Publicise good practice training guidance to support this, and as part of encouraging take up, will lead the way by providing disability equality and awareness training for DfT staff as part of our staff development programmes.	Launch a public awareness campaign , working with a wide range of partners, to promote ways of positively interacting with disabled people in order to ensure a supportive travelling experience and reduce instances of disability related hate crime on transport.
Work to ensure that all public transport bodies understand their obligations under the Public Sector Equality Duty within the Equality Act 2010 in relation to planning and delivering transport, and they are clear that there are risks of legal proceedings brought by the public or through enforcement action by the Equality and Human Rights Commission for non-compliance.	Promote the assistance and financial savings available to disabled travellers, through schemes such as the Disabled Persons Railcard, the Passenger Assist scheme for rail travel and disabled bus concessions in order to increase take up of these schemes.

Inclusive Transport Strategy

Specific commitments that are relevant to buses (2/2)

Ensure that disabled travellers are fully aware of their rights and the obligations of transport operators, and know how to raise complaints if needed, by the provision of easily accessible information in a variety of formats.	Take action to ensure transport providers improve the availability of information particularly in relation to real time information on accessibility services such as toilets.
Establish a framework to ensure bus operators are implementing mandatory bus driver training .	Kick-start improvements in physical infrastructure by investing £2 million on installing audio visual equipment on buses , and challenge the transport industry to follow our lead.
Increase transparency and accountability in relation to the inclusivity of the transport system. We will publish data on accessibility and where possible publicise the work undertaken by individual operators to improve inclusivity.	Ensure future technology is designed inclusively and opportunities are sought out to harness innovation.

Actionable points:

How can we all contribute to the delivery of these commitments?

- Become aware and **promote the principles included in the ‘it’s everyone’s journey’ campaign**. Pay particular attention to the section of: support for disabled people using public transport, which includes information on individual rights disabled passengers have when travelling and how to recognise and report hate crime.
- Promote the use of the disability awareness training package. Link to **REAL training for bus and coach here**.
- DfT’s training includes accompanying disabled passengers on a range of transport modes, as well as classroom sessions conducted by a trainer with lived-experience of disability. Similar training where LTAs and transport operators can get a **better exposure to the lived-experience of disabled passengers is encouraged**.
- **Consider the PSED**, including on how schemes contribute towards the advancement of equality of opportunities for groups of protected characteristics.
- **Identify good practice** towards inclusivity taken by other bus operators and LTAs. See the example of Brighton and Hove Buses. Additional resources are also included at the end of this report.
- Consider opportunities to further improve accessibility with the new mandatory requirement to **provide audible and visible route and location announcements** onboard local services across Great Britain. Could this be coupled with other accessibility enhancements to vehicles, the stops and stations served, or the training and conduct of drivers?
- Promote the dissemination and accessibility of **information related to bus concessions**.

English National Concessionary Travel Scheme (ENCTS)

What is ENCTS:

Guaranteed free travel for people over state pension age, and people with an eligible disability, on eligible local bus services anywhere in England (between 0930-2300 on weekdays and all-day weekends and Bank Holidays).

Scheme introduced in 2007, with the government amending legislation in 2018 to protect the scheme in its current format and ensure its long-term continuity.

Link to the news story on legislation changes

Link to the Concessionary travel statistics: year ending March 2023

Implementation:

- Local authorities are responsible for reimbursing bus operators for ENCTS journeys. The Government funds this reimbursement as part of the Revenue Support Grant for local authorities.
- Local authorities may provide further concessions within their boundaries, paid for with their own funds. See examples below.

Discretionary concession	% of TCAs*
Extensions to the beginning of the statutory time period (9:30am during weekdays)	79%
Companions to disabled people	63%
Extensions to the end of the statutory time period (11:00pm) during weekdays	62%
Allowing the use of the discretionary companion passes issued by other TCAs	44%
On-demand transport services	44%
Park and ride services	38%

Source: [DfT concessionary travel statistics](#)
*Considers 84 Travel Concession Authorities in England outside of London

Headline figures

- In England, comparing the year ending March 2023 with the year ending March 2022, there were:
- 8.7 million older and disabled concessionary **travel passes, no change**
 - 567 million concessionary **bus journeys, up 15%**

Actionable points:

- Assess current **ways in which the ENCTS is being promoted** to relevant groups. Ideally, a robust communications strategy should be in place which adequately considers target audience, clarity and transparency, dissemination channels, partnerships, evaluation metrics, etc.

Mandatory onboard travel announcements

In 2023, the Department for Transport introduced rules to require almost every local bus or coach service to provide audible announcements and visual displays identifying the route and direction, each upcoming stop, and the beginning of any diversions.

Benefitting groups with various accessibility requirements, be it people with different degrees of visual impairment, but also the elderly, children, people with autism or sensory sensitivities, tourists, non-native speakers, etc.

Link to the News Story

Implementation

- At the start of 2023, only 30% of buses outside of London provided audiovisual information.
- A £4.65 million in funding is being made available for small operators to upgrade vehicles. This is expected to happen in a gradual manner, with **almost all vehicles required to comply by October 2026.**
- While operators have some flexibility in choosing solutions that suit their services, there is general guidance to ensure that audio information is accessible through induction loop systems. Additionally, all new vehicles introduced after October 2024 should include visible information that can be seen by wheelchair users occupying rearward facing spaces.

Quality should be considered when upgrading vehicles. This includes ensuring consistent, high-quality sound throughout the bus, as well as clear displays that meet the diverse accessibility needs of passengers. Factors to consider include appropriate colour schemes, screen sizes, and visibility from different sight lines.



Roads and Accessibility Minister Richard Holden: *“Massive boost for passenger independence”*

Guide Dogs’ Chief Executive, Tom Wright CBE:
“At Guide Dogs, we are delighted that the government has taken this significant step in making bus travel more accessible to people with a visual impairment. Our research shows that over half of people with sight loss have missed their stop due to a lack of AV, and many people avoid bus travel altogether because buses remain inaccessible.”

It's everyone's journey campaign

Campaign developed by the Department for Transport in partnership with industry, disability groups and disabled people, with the aim of championing equal access on public transport (with a particular focus on disabled groups).

Includes resources on:

- How everyone can make a difference
 - Real people's stories
 - Case studies
- Support for disabled people using public transport
 - Individual rights disabled passengers have when travelling
 - How to recognise and report hate crime.
- Links to and promotion of REAL disability awareness training

Link to the campaign's webpage

Real people's stories

- "All I need is kindness" – By Karishma
- "A little space a time please" – By Lindsay
- "Travel with a companion to help build your confidence" – By Jean
- "I'm not doing it on purpose" – By Georgie
- Coping with Unexpected Change – By Connor Ward
- A Little Consideration Goes a Really Long Way – By Karen
- Offer Your Seat and Make a World of Difference – By Sophie
- "You Don't Look Disabled" – By Mark
- "I Didn't Feel I Could Turn to Anyone for Support" – By Vijay
- Pop Out of Your Shell Every Now and Then – By Emily
- Let's Slow Down a Bit – By Kathy
- "People could look at me and never realise I have a disability" – By Abdul

Actionable points:

- Step 1. Familiarise yourself with the case studies from the campaign (see also next page) and actively look for others.
- Step 2. Share and discuss them with relevant-decision makers and other key stakeholders. Consider best mechanisms for adapting similar initiatives within your service / local area.
- Step 3. Record any tangible action towards this, either in the short-term or by embedding into longer-term planning.

Advancements
over timeKey policy and
guidance

It's everyone's journey campaign

Case studies included in the webpage

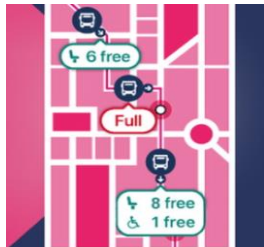
Brighton & Hove and Metrobus: Helping Hand

- Yellow cards (now being developed into smartphone app) which discreetly say what help the passenger may need.
- Examples include: 'please wait until seated', 'please face me, I lip read'. Cards can also be customised.


[Read more](#)

First Bus update their passenger app

- Mobile app which allows passengers not only to live-track the location of their next bus but also to show them its available capacity, including available wheelchair spaces across its fleet.


[Read more](#)

Seeing Differently

- Arriva UK Bus has been developing several initiatives after signing the RNIB's Bus Charter.
- These are guided by the 13 pledges, and include: additional driver training, lived-experience simulations and awareness events.


[Read more](#)

East Yorkshire bus company helps drivers understand dementia

- Working with Hull Dementia Alliance to put together a bespoke Understanding Dementia course for bus drivers. Helping them understand how the condition can affect people, how to recognise it, and what to do to assist people with the condition.


[Read more](#)

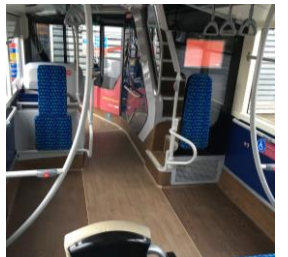
New Demand Responsive Bus service – Stagecoach

- Nine new buses, all with disabled access, will be used for the pilot.
- The Tees Flex service aims to help residents in more isolated communities' access essential services along with training and employment opportunities.


[Read more](#)

Making Bus Transport More Accessible – First Group

- Improvements following consultation with disability groups.
- Examples include: additional wheelchair spaces, audio-visual next stop system, redesigning the shape of a hand-pole, changing stop bell placement, etc.


[Read more](#)

Advancements
over timeKey policy and
guidance

ENOUGH campaign

Campaign developed by Home Office to bring visibility of the issues around abuse and the collective role that we can all play in ending violence against women.

Whilst this is not transport specific, it covers important concepts around recognising VAWG and acting against it.

It is important that driver and staff training is aligned with these principles. It would also be relevant to explore how these concepts can be disseminated with the wider passenger to create a 'community of support' within public transport. See the case of Nottingham here.

50% of women aged 16-34 experienced at least one form of harassment between June 2020 and June 2021 (ONS, 2021)

[Link to the Enough Campaign](#)

What is VAWG?

Violence against women and girls (VAWG) can take many forms. Abuse in a public place can include:

- Making sexually explicit comments or gestures in public
- Leering or unwanted staring
- **Sitting uncomfortably close on public transport**
- Unwanted questions about someone's sex life
- Unwanted sexual attention or asking for sex
- Upskirting
- Flashing
- Following someone
- Stalking
- Groping
- Spiking

What to do about it? – Key messages

STOP – The following include tactics that can be used depending on the situation, who you are and who's involved.

1. Say Something
2. Tell someone
3. Offer support
4. Provide a diversion

Actionable points:

Help us **share and act on these principles!** Make use of the assets from the Enough Campaign. These include:

- Internal assets to distribute and internalise within our own organisations
- External assets that can be displayed in transport, information centres, etc.



Putting people first



General principles

Putting people first

Passenger-centred Bus Improvements

Passenger's needs and expectations should be at the centre of bus planning.

To support adequate consideration of this through BSIPs, both Bus Users UK and Transport Focus Group have developed useful pieces of short guidance.

These cover the different stages of strategy, data collection, planning, delivery and M&E.

Read-more at the links below

Bus Users UK 10 key point guide on BSIPs

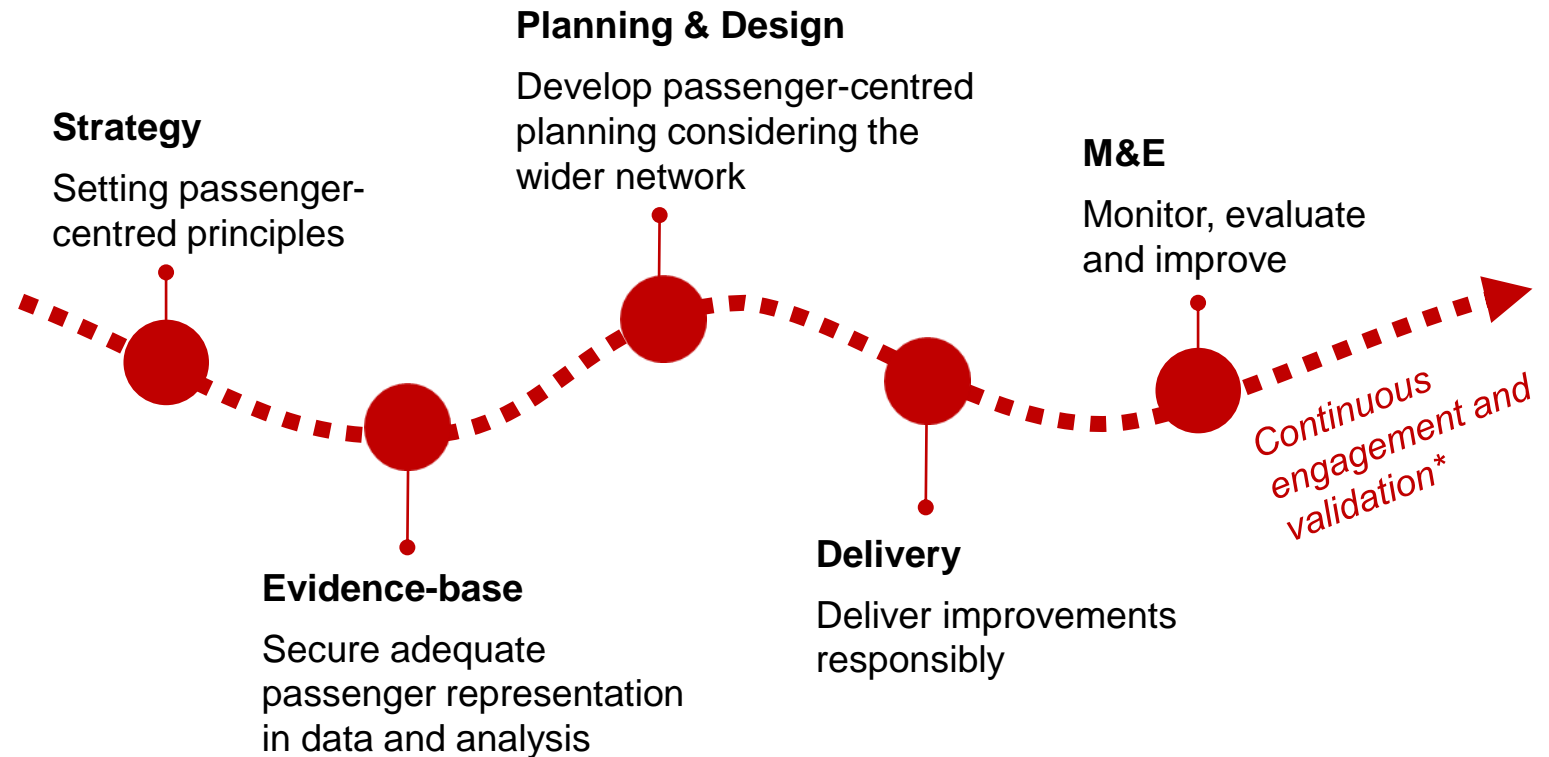
Transport Focus Group. Passenger representation on BSIPs

Transport Focus Group. Passenger charters for BSIPs

Bus Users UK. Establishing groups and customer panels for BSIPs and Enhanced Partnerships

Transport Focus Group. Setting targets in BSIPs

Considerations across stages



*Securing adequate levels of engagement will be key to ensure social relevance of the measures proposed. As such, it should not be seen as a one-off exercise but as a continuous and active process to shape improvements.

Putting people first

Ensuring appropriate data & engagement

There are good examples that can serve as starting points for data and user-centred explorations.

See more on the links below:

- Transport for the North. Report and maps on Transport Related Social Exclusion
- DfT & Yonder. Increasing bus patronage through an audience strategy
- National Travel Attitudes Study Wave 8. Women’s experience using transport.
- Transport Focus. Bus User Surveys (published annually)

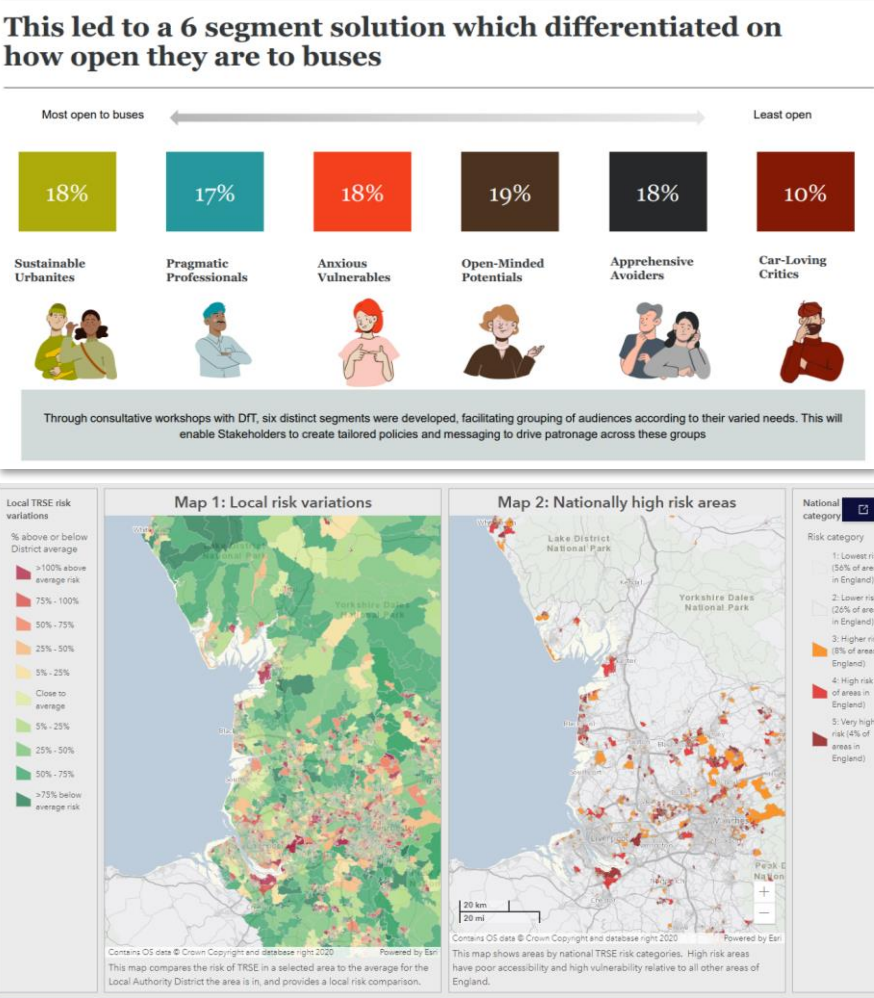
Examples of good data sources and initiatives

DfT & Yonder. Increasing bus patronage through an audience strategy

Research to support developing strategies and policies to encourage greater bus usage by considering 6 key population segments.

Transport for the North. Transport Related Social Exclusion.

Comprehensive research on what causes social exclusion and how to address it. The report is supported by interactive maps of TRSE in local areas of England.



Putting people first

Ensuring appropriate data & engagement

As seen, there is some good national and global research and data tools to further explore the needs and expectations of groups of protected characteristics. However, often data specific to these groups will not be readily available at the local level. In any service improvement planning, it is crucial that their existing and potential travel patterns are acknowledged on a context-based form.

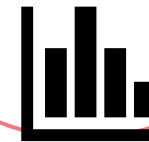
This will inevitably mean primary research and validation of proposals with targeted groups. There are many ways to do this, for example, see on the right the suggestions by Transport Focus. These are 5 actionable points on how to secure balanced and inclusive representation.

Passenger representation – How to address data gaps? Actionable points

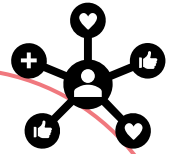


Decide who
you need to
hear from

Make full use of
the information
you already have
available



Consider
commissioning
passenger research,
for example focus
groups, to quickly plug
gaps in your data



Engage directly
with passengers,
community groups
and local elected
representatives

Think carefully who
is best placed to
powerfully represent
the passenger
interest on boards
and committees



Personas

Putting people first

Ensuring appropriate data & engagement : Considering personas

The examples shown so far provide a good exploration of the needs of different users. In order to better target groups of protected characteristics, this toolkit has developed indicative cards to facilitate further exploration of how different groups may experience traveling by bus.

It's important to note that these are preliminary considerations intended to guide further research at the local level, as the experiences, needs, and expectations of these groups may vary.



The Elderly

*There are almost 9m ‘older people’
concessionary bus passes in
circulation in England (DfT, 2023)*

Concessionary travel from older people represents an important proportion of bus journeys in the UK. For many elderly people, the bus represents their **only way to travel independently** outside of their immediate surroundings. It is a way of **access to critical services** as well as to **socialise, and travel for leisure**. Ealing Community Transport research shows how community bus services support older adults through reducing isolation and reduce the pressure on the health and social care sector.

Also see: Ealing’s work on the value of
Community Transport

Meet Laura

Laura lives on her own and can sometimes feel lonely. However, she enjoys taking the morning bus service to town on Mondays, Wednesdays and Fridays as she knows it is always the same driver, who is very kind to her and has previously reminded her when she reached her stop. Lately she has also started venturing further as she was informed of a new fare integration and was given a map of which other high streets she could now access.



Planning for the elderly:

To the bus stop / Journey planning

- **Journey planning tools:** Enabling personalised multi-modal planning accounting for diverse accessibility requirements (e.g. indicating if there are wheelchair spaces currently available), as well as providing advice on best fares. Enable live monitoring of services and options for easily adjusting trips in case of delays or other unforeseen changes. Consider personalised and inclusive forms to communicate changes in services.
- **Accessible colours:** Ensure compliance with level AA of the Web Content Accessibility Guidelines (WCAG 2.2).
- **Accessible information at stops:** At distinguishable locations visible from different heights. Using simple and clear language. Consider audio announcements at key stops. Include print outs and contact number of operators and alternative information providers.
- **Routes:** Ensure step-free routes to/from key origins and destinations, also avoiding street clutter. Ensure appropriate wayfinding and intuitive routes.
- **Comfort at stops:** Sheltered and with comfortable seating (especially in areas where bus frequency is not high).

On the bus

- **Support for boarding / alighting:** Two doors. Tested physical accessibility and convenience.
- **Friendly, considerate and consistent staff:** Greeting at boarding / alighting, offering support (physical support, information, etc.), ensuring passengers are seated before moving, consistency of drivers along corridors (where possible).
- **Promoting a community of support:** Campaigns to raise awareness among passengers of the needs of elderly people. Mindful ways of offering a seat, offering information, offering a conversation. Being considerate with noise levels and the impact that one's own behaviour can have.
- **Accessible information:** Again, in a variety of formats. Audio and QR codes are also useful (especially for those with visual impairments).
- Other aspects that contribute to an **enjoyable environment:** Cleanliness of services, large windows, light colour schemes.

Bus network considerations

- **Prioritise these considerations key routes,** including those feeding to community facilities and healthcare. Also, along routes where there is significant 'older people' concessionary travel (this might involve further research and monitoring of ridership patterns). Review journey frequencies along key routes.
- **Consider the integration between transport services** (e.g. interface between community transport and core transport services) to target for the needs of the elderly. Validate this through engagement.

Children

In 2022, 4% of children aged 5 to 10 travelled to and from school by local bus, compared to 40% who travelled by car or van (NTS, 2022)

Children under the age of 5 in England can typically travel for free on buses. However, this can often be challenging when services are limited and when there are no suitable waiting conditions at bus stops or space within the bus.

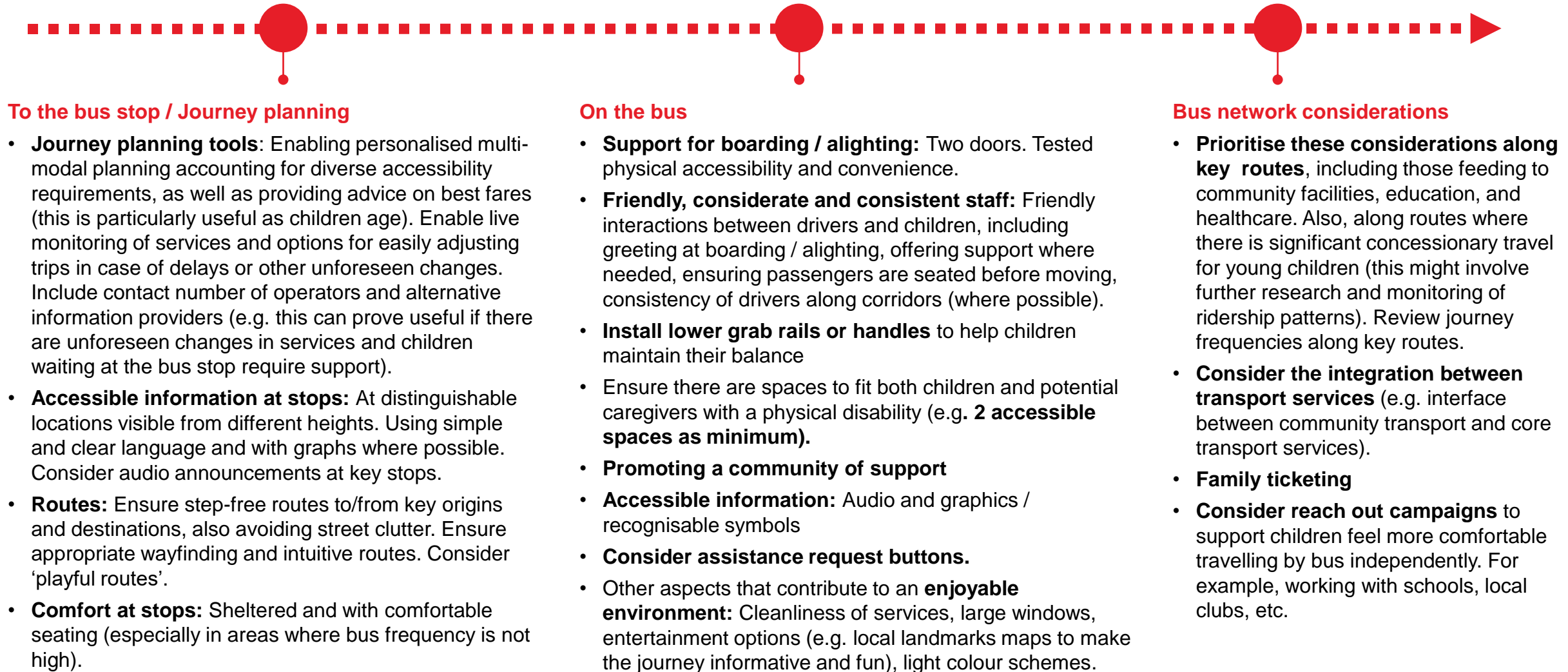
After the age of 5, their accessibility requirements typically start lowering, but at this age fares become subject to variation based on geographical location, operator policies, and available discounts. Ensuring that children can confidently and comfortably access bus services as they grow older is crucial, as it serves as a fundamental step towards fostering their independence in long-distance travel.

Meet Toby

Toby travels to school by bus everyday with his grandmother and baby brother. Given his grandmother often carries multiple items, Toby takes initiative by independently boarding the bus and navigating within, making use of the convenient low-rails for support. He particularly enjoys using the 'local landmarks map' on the bus to identify their final stop, which enables his grandmother to attend to other matters during the journey.



Planning for children:





Case study – Nottingham City Council – Travel Safe Partnership

What:

Partnership working to standardise the approach to tackling crime and anti-social behaviour, and to improve the perception of safety on the public transport network.

How:

- Working across modes (tram and bus) and with collaborators to secure alignment and improve outreach.
- Standardised monitoring of the data on incidents reported.
- Marketing campaign with key standardised messages.
- Delivering targeted interventions.

Engagement and out-reach programme

Collaborating and building on the work from other initiatives, charities and community groups in Nottingham such as the Nottingham Safety and Education Partnership, the Pythian Club, Communities Inc., the Safe Space Pledge, working with Community Protection Officers, etc.

This engagement strategy will allow to offer targeted initiatives. For example, previous collaborations with the Pythian Club has already allowed to deliver ‘safety’ training at schools through the ‘You versus Tram’ campaign. This campaign goes beyond Health & Safety recommendations, to create a wider sense of shared ownership on safe and respectful travel.

Why:

- Partnership working supports a standardisation on the approach towards safety in the transport network and the delivery of consistent messages. It also supports an increase in engagement and creates a sense of shared responsibility.

[Learn more](#)

Disability

17.7% of people in England had a disability in 2021. In 32% of households at least one person was identified as disabled. (ONS, 2021)

Disabilities or impairments come in various forms and can arise at different life stages. Inadequate environmental conditions often create disadvantages for individuals with disabilities, resulting in **additional expenses, a higher risk of poverty, and restricted independence in daily tasks**. For many people with disabilities, driving or covering long distances on foot is not feasible. This emphasizes the **critical role of buses as a primary mode of transportation**, enabling **equitable participation in society** and access to various opportunities.

Meet Freddy

Initially relying on driving to commute to work, Freddy has started using the bus as his Alzheimer's progresses. Despite this change, he maintains his independence by relying on clear street signs and helpful bus staff. He receives personalised notifications for any service alterations and finds comfort in easily accessible assistance numbers at the bus stop, ensuring he has support available if needed during his journey.



Note: Considerations in these page are significantly broader in order to cover different types of disability or impairment. It is recommended that further explorations are made looking at the different types of disability.

Planning for people with a disabilities:

To the bus stop / Journey planning

- **Journey planning tools:** Enabling personalised multi-modal planning accounting for diverse accessibility requirements as well as providing advice on best fares. Enable live monitoring of services and options for easily adjusting trips in case of delays or other unforeseen changes. Consider personalised forms to communicate changes in services.
- **Accessible colours:** Ensure compliance with [level AA of the Web Content Accessibility Guidelines \(WCAG 2.2\)](#).
- **Accessible information at stops:** At distinguishable locations visible from different heights. Using simple and clear language. Consider audio announcements at key stops. Include print outs and contact number of operators and alternative information providers.
- **Routes:** Ensure step-free routes to/from key origins and destinations, also avoiding street clutter. Ensure appropriate wayfinding and intuitive routes.
- **Comfort at stops:** Sheltered and with comfortable seating (especially in areas where bus frequency is not high). People with some forms of neurodivergence appreciate spaces 'to rest' (e.g. a well demarcated bus shelter) away from spaces of 'speed and movement' (e.g. busy footways).

On the bus

- **Support for boarding / alighting:** Two doors. Tested physical accessibility and convenience.
- **Friendly, considerate and consistent staff:** Greeting at boarding / alighting, offering support (physical support, information, etc.), ensuring passengers are seated before moving, consistency of drivers along corridors (where possible).
- **Promoting a community of support:** Campaigns to raise awareness among passengers of the needs of people with disabilities, even if these are not visible (e.g. being considerate with noise levels as some people might struggle to cope with too strong sounds).
- **Accessible information:** Again, in a variety of formats. Audio and QR codes are also useful (especially for those with visual impairments).
- **Adequate colour schemes:** Good lighting (supporting visually impaired passengers reaching their seat), light floors (as dark floors can hinder the experience of those with autism).
- **Consider assistance request buttons.**
- **Consider charging points next to wheelchair spaces** (for wheelchair batteries and phones).
- Other aspects that contribute to an **enjoyable environment:** Cleanliness of services, large windows.

Bus network considerations

- **Prioritise these considerations along key routes**, including those feeding to community facilities, and healthcare, and routes where there is significant disabled person concessionary travel (this might involve further research and monitoring of ridership patterns). Review journey frequencies along these routes.
- **Consider the integration between transport services** (e.g. interface between community transport and core transport services)
- **Consider reach-out campaigns to support individuals feeling more comfortable travelling by bus independently** (could be delivered in partnership with organisations representing different disability types).

Resources to support planning for people with a disabilities in mind:

The following resources include deeper explorations on the diverse needs of people living with disabilities. It also includes relevant guidance currently available, recognition of limitations and future research.

<p>Bus Centre of Excellence free access modules on:</p> <ul style="list-style-type: none">• Understanding Disability• Designing highways and transportation for people with dementia	<p>Accessible Public Realm: Updating Guidance and Further Research. Overview and recommendations (DfT, 2020)</p>	<p>Streets for Diversity. Exploring how neurodivergent people experience streets (Royal College of Art, 2023)</p>
<p>PAS 6463:2022. Design for the mind – Neurodiversity and the built environment – Guide (The British Standards Institution, 2022)</p>	<p>‘Aural Diversity Infographic’ (Hugill, A. 2022)</p>	<p>Building Confidence – Improving travel for people with mental impairments. Report produced for the Disabled Persons Transport Advisory Committee (Mackett, R, L., 2019)</p>
<p>Inclusive Mobility. A Guide to Best Practice on Access to Pedestrian and Transport Infrastructure (DfT, 2021)</p>	<p>Aural Diversity Toolkit (Arup, 2024)</p>	<p>Promoting the independent mobility of young people with SEND: The lived experience of young people with autism, ADHD, and learning disabilities (Sarah, E, O’T., Rob,W., John,B., Nicola, C, 2022)</p>
<p>Review of the Public Service Vehicles Accessibility Regulations 2000 (DfT, 2023)</p>	<p>Inclusive Journeys. Improving the accessibility of public transport for people with sight loss (RNIB, 2023)</p>	<p>Bus Users Accessibility Audit (Bus Users, 2023)</p>
	<p>Seeing streets differently: How changes to our streets and vehicles are affecting the lives of blind and partially sighted people (RNIB, 2021)</p>	



Case study - Nottingham City Council – Independent Travel Training

What:

Free service offered to children and young people who have Special Educational Needs and Disabilities (SEND) to support them in feeling more confident travelling independently.









How:

- Working directly with individuals through direct referrals from schools, colleges, SEND services and Futures.
- Training up schools and colleges so they can deliver the programme directly to their students.

Why:

Promoting independence and enabling access, increasing confidence and feeling of safety, helping improve social skills, opening up opportunities for further education, employment and leisure.

Modules:

- Coping with traffic and road safety
- Learning the highway code
- Confidence in using buses, trams and trains
- Journey planning
- How to use timetables and visual aids
- Where to get help
- Personal safety
- Money skills

[Learn more](#)

LGBTQ+

1 in 5 LGBTQ+ have experienced a hate crime or incident due to their sexual orientation and/or gender identity in the last 12 months (YouGov & Stonewall, 2017 – UK-wide survey)

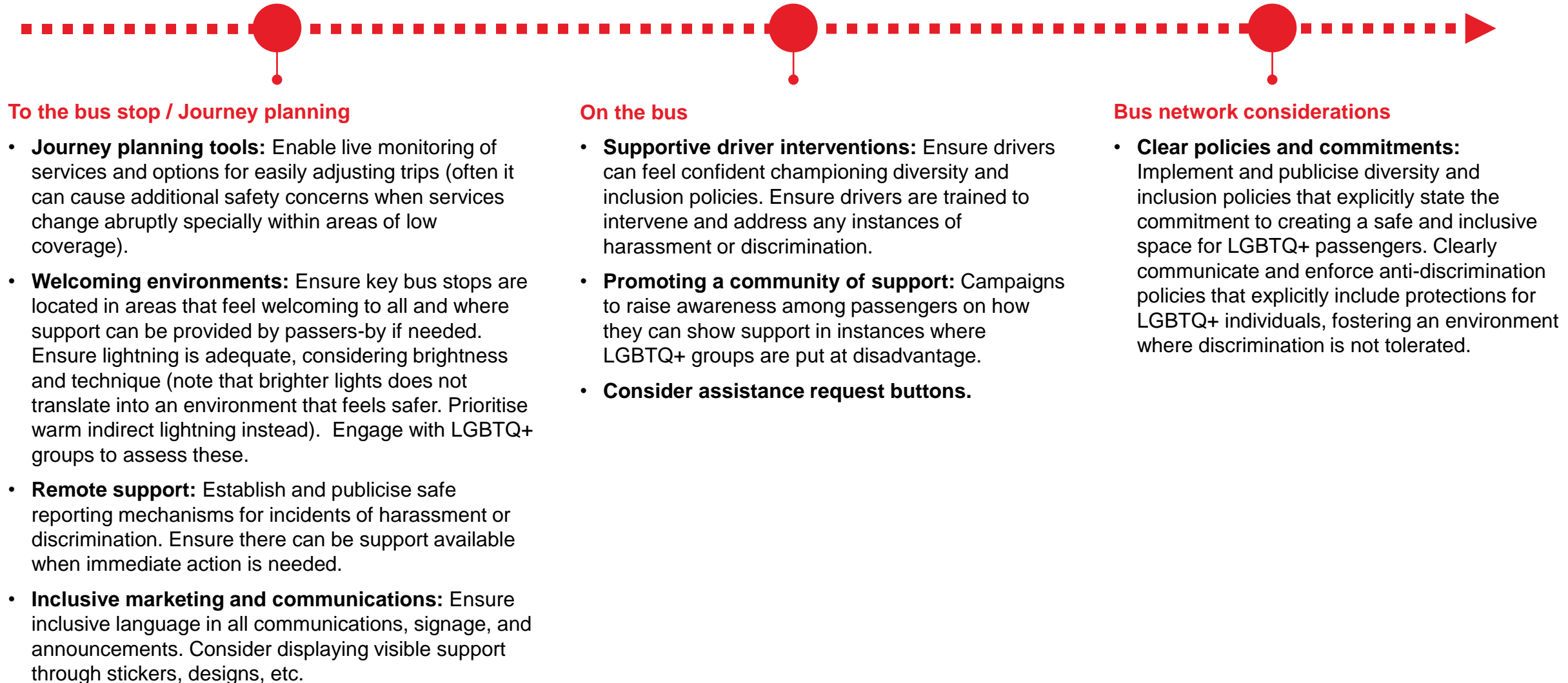
While further research is essential to understand the context-specific experiences of LGBTQ+ communities using transport, existing literature emphasises the increased **risk of encountering anti-social behaviour, violence, and harassment in public spaces** for these individuals. Beyond simply mitigating harm, bus services can play a pivotal role in providing **accepting environments** for these groups, many of whom have faced exclusion elsewhere. By taking a **proactive stance on inclusivity**, buses can not only ensure basic conditions for LGBTQ+ individuals during travel but also encourage their regular patronage.

Meet John

John enjoys visiting cultural venues around town. However, he feels uneasy about traveling to areas with infrequent bus services, fearing potential cancellations that might lead to prolonged waits at the bus stop. An unfortunate past experience of abuse during afterhours travel has made him cautious, prompting him to be extra vigilant and selective about his travel plans.



Planning for LGBTQ+ groups:



Single parents

Single parents make up around a quarter of families with children in the UK. 9 out of 10 single parents are women. (Gingerbread, 2023)

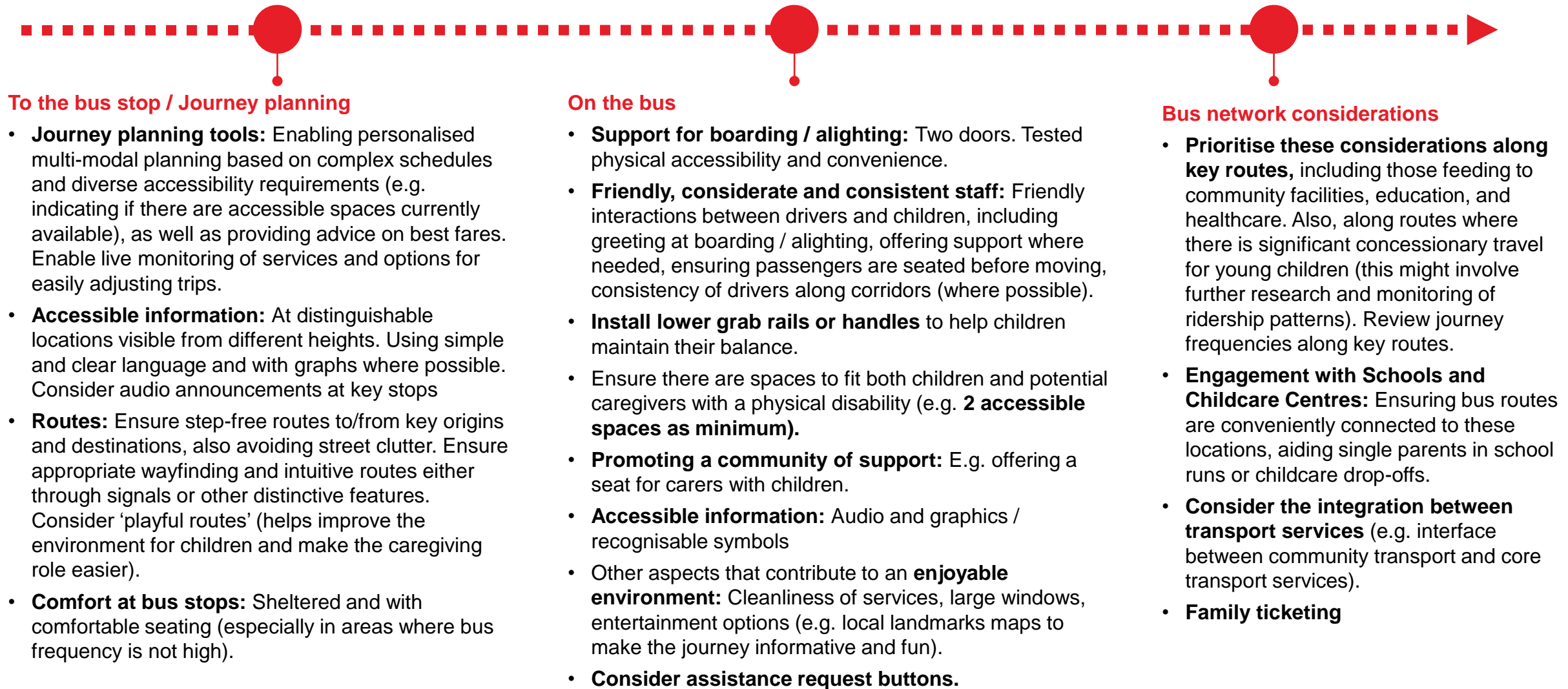
Single parents will often have to balance diverse responsibilities leading to **competing demands over their time**. They are also more likely to be in low-paying or part-time employment which can also place **additional financial strains** and can limit their ability to conduct trips for non-essential purposes. **Accessible and reliable bus services that also cater for 'non-conventional' commuting trips** are therefore pivotal in aiding single parents to efficiently plan their schedules, facilitating their equitable participation in society.

Meet Henry

As a sole caregiver, Henry picks up his young daughter from school daily, and they return home by bus. Limited access to gender-neutral facilities in public spaces often forces them to wait until they return home for suitable accommodations. Timely bus services are crucial for them to avoid missed connections, which could significantly extend their journey. Henry greatly relies on real-time apps, providing the flexibility to reroute if necessary.



Planning for single parents:



Ethnic minorities

Non-white people make twice as many public transport trips than white people (NTS, 2021)

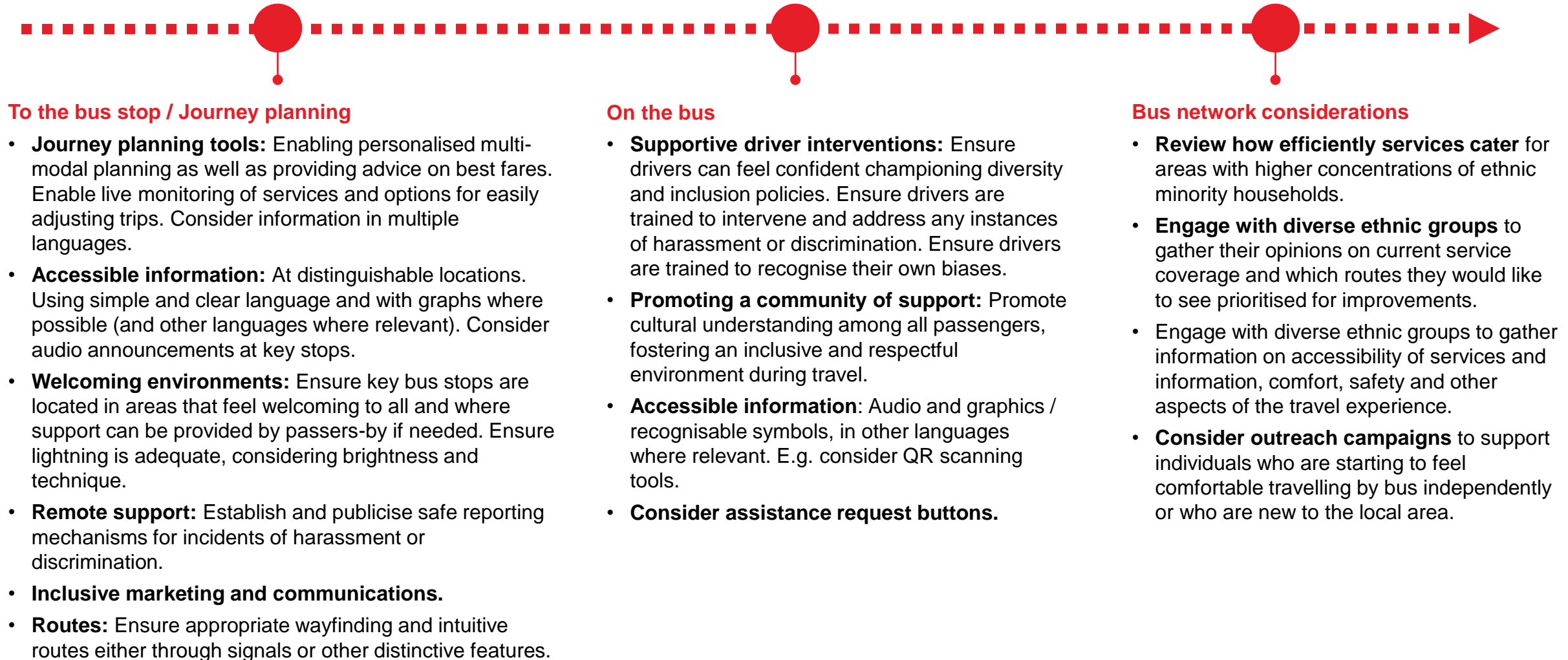
The experience of individuals from different ethnicities will vary on transport, and therefore targeted research that accounts for local conditions and cultural factors is encouraged. Considering wider income inequalities that persist in the UK between ethnic minority communities as well as the fact that these communities are **less likely to own a car**, it is crucial that adequate and accessible public transport is available to them, whether they live in rural areas or potential pockets of transport poverty within urban areas. The NTS 2019 already shows that individuals that identify as black, mixed and 'other' are **more likely to travel by bus**, however, their experience using transport, considering wider **precedents on social discrimination** should also be explored.

Meet Laura

During Laura's upbringing, her parents often chauffeured her due to fears of discrimination. Since relocating to a larger city for university studies, she has begun navigating solo travel for the first time. Laura found it immensely helpful that the local bus operator had a booth at the university fair. This offered her personalised guidance on initiating independent bus travel, a valuable resource as she ventured into traveling on her own.



Planning for ethnic minorities:



Women and girls

Women in England make around 30% more trips by bus than their male counterparts (NTS, 2019)

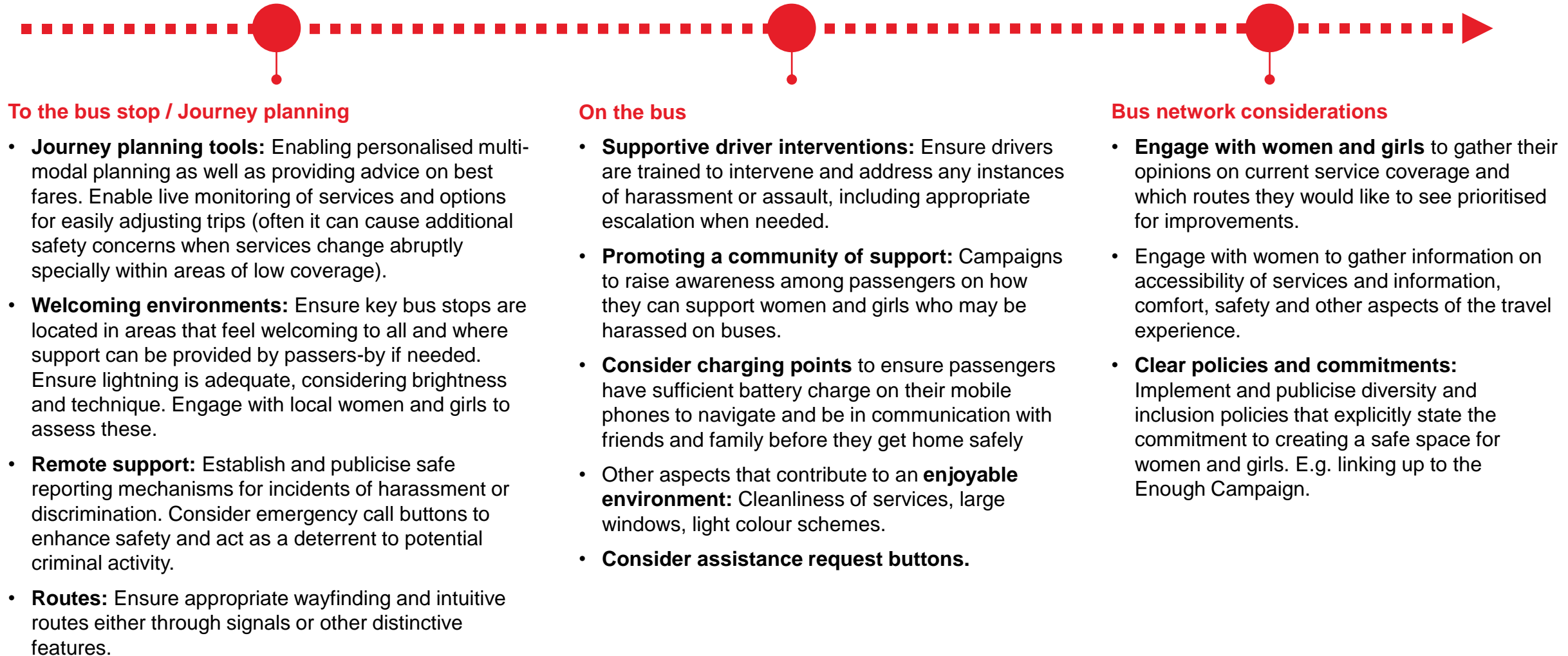
Research consistently demonstrates that women, in comparison to men, **use public transport more, engage more in trip-chaining activities, and often shoulder more caretaking responsibilities.** They also heavily rely on buses for various trip purposes. However, many women also encounter **safety concerns, perceived safety issues, and broader accessibility challenges,** especially when traveling with dependents or carrying things. Additionally, they can face disproportionate challenges related to **time constraints and affordability,** particularly in situations where conditions for seamless trip-chaining are inadequate. The **transport workforce also does not adequately represent women,** with them accounting only for 21% of the overall workforce in the UK.

Meet Jane

Living in the suburbs of the city, Jane takes the bus to and from work on weekdays and for leisure activities on weekends. She has two jobs so sometimes finishes late; she would optimise her route home so that she walks in well-lit and familiar areas to feel safe, even if it takes longer. When buses are late, she feels anxious that she might have to walk home.



Planning for women and girls:





Case study - Nottingham City Council – Safe Space Pledge

What:

An innovative way for venues and operators to show that they value the safety of women in their premises. Taking the pledge involves having trained staff to respond and intervene if a woman feels unsafe.

How:

- The Consent Coalition has worked with a number of partners to develop the pledge based on best practice on women's safety.
- This is being rolled out across sectors, including transport. Currently all bus operators in NCC are supporters of the pledge by integrating training in the annual programme for drivers and by signalling through communications (e.g. at bus stops and waiting areas).

Why:

The majority of women who responded to a 2021 survey indicated that they do not feel safe in Nottingham City Centre at night. They called for more to be done about raising awareness of consent and improving availability of safe spaces and trained staff.

Learn more: [NCC Consent Coalition](#)



Summary of considerations

Summary

The table below aims to offer an indicative overview of passenger-centric measures intended to enhance the bus user experience for a diverse range of individuals. While each measure is anticipated to generate positive impacts, the categorisation serves to emphasize areas where effects might be relatively more pronounced among different groups based on their specific protected characteristics.

It's important to note that this table is a preliminary representation based on universal research findings. Local Authorities are encouraged to conduct individual evaluations tailored to the specific dynamics of their respective areas of influence

Key

L – Low impact*

M – Medium impact

H – High impact

**But still valuable impact*

Part 1/3

	The Elderly		Children		Disability		LGBTQ+		Single-parents		Race		Women	
Information														
Journey planning tools for personalised multi-modal planning		H		H		H		L		H		M		H
Accessible information at stops and within buses (audio-visual, clear language, graphics, digital and printed)		H		H		H		L		L		L		L
Real-time information		H		H		H		L		H		M		H
Options for personalised advice on journey planning, fares and discounts		H		H		H		L		M		M		M
Clarity on how to access remote assistance		H		H		H		H		L		H		H
Reach-out campaigns to build confidence on using buses		H		H		H		L		M		H		M

About this guide	Policy and guidance		Putting people first		Making the case for social value		Summary of resources		Actionable points		ARUP
	General principles		Personas		Summary						
Part 2/3			The Elderly	Children	Disability	LGBTQ+	Single-parents	Race	Women		
Environmental considerations											
Comfort at bus stops (seating, shade/shelter at key stops, adequate lightning technique)			● H	● H	● H	● M	● H	● M	● H		
Welcoming environments and place-making around key stops			● H	● H	● H	● H	● H	● H	● H		
Accessible routes to bus stops (dropped kerbs, tactile pavement, reduced clutter, etc.)			● H	● H	● H	● L	● H	● L	● H		
Placemaking along key routes, routes that ‘feel safe’, ‘playful routes’			● H	● H	● H	● H	● H	● H	● H		
Bus design and service											
Friendly and considerate staff			● H	● H	● H	● H	● H	● H	● H		
Trained drivers on dealing with incidents of harassment and discrimination			● M	● L	● M	● H	● L	● H	● H		
Community of support within the bus			● H	● H	● H	● H	● H	● H	● H		
Accessibility features buses (e.g. multiple doors and adequate mechanisms for easy boarding/alighting, more than wheelchair space, lower hand bars, etc.)			● H	● H	● H	● L	● H	● L	● H		
Adequate lightning and bright floors			● M	● M	● H	● M	● M	● M	● M		
Charger points (especially next to priority spaces)			● M	● L	● H	● L	● L	● L	● L		
Other positive features - clean services, large windows			● M	● M	● M	● M	● M	● M	● M		

About this guide	Policy and guidance	Putting people first		Making the case for social value		Summary of resources		Actionable points		ARUP					
	General principles		Personas		Summary										
Part 3/3		The Elderly		Children		Disability		LGBTQ+		Single-parents	Race	Women			
Network Planning and Operations															
Integrated-ticketing		●	H	●	H	●	H	●	L	●	H	●	M	●	H
‘Hopper’ fares		●	H	●	H	●	H	●	L	●	H	●	H	●	H
Travel discounts (concessionary travel, discounts to younger age groups, family discounts, off-peak travel discounts, etc.)		●	H	●	H	●	H	●	L	●	H	●	M	●	M
Improved travel data collection – considering collecting travel data on groups of protected characteristics		●	H	●	H	●	H	●	H	●	H	●	H	●	H
Adequately balanced passenger representation boards – with periodic meetings and input of recommendations into both service coverage (routes, frequencies, etc.) and travel experience (safety, comfort, accessibility, etc.)		●	H	●	H	●	H	●	H	●	H	●	H	●	H
Periodic public surveys (wider-reach-out)		●	H	●	H	●	H	●	H	●	H	●	H	●	H
Clear mechanisms by which passengers can submit feedback and recommendations on bus service operations		●	H	●	H	●	H	●	H	●	H	●	H	●	H
Reporting and traceability on how passenger data and recommendations collected feed into service improvements and prioritisation of measures		●	H	●	H	●	H	●	H	●	H	●	H	●	H
Network approach to ‘bus planning for social need’		●	H	●	H	●	H	●	L	●	H	●	M	●	H

Making the case for Social Value



General current guidance on transport business cases

The basics

The Green Book is the Central Government’s guidance on appraisal and evaluation.

Aligned with this, the DfT uses the **Transport Analysis Guidance (TAG)**, which provides further information for transport proposals. It also explains how the transport appraisal process supports the development of investment decisions.

The Transport Appraisal Process is a 3-stage process of option development, further appraisal and implementation/evaluation. This process is aligned with wider guidance from the Green Book, as it uses the Five Case Model to inform the development and appraisal of options.

[Link to the Green Book Review 2022](#)

[Link to the Transport Analysis Guidance](#)

What do we mean by ‘appraisal’?

“Appraisal is the process of assessing the costs, benefits and risks of alternative ways to meet government objectives. It helps decision makers to understand the potential effects, trade-offs and overall impact of options by providing an objective evidence base for decision making.” – HM Treasury Green Book, 2022

The 5 Case Model

“The Five Case Model is the required framework for considering the use of public resources to be used proportionately to the costs and risks involved, and taking account of the context in which a decision is to be taken. The five “cases” or dimensions are different ways of viewing the same proposal.” – HM Treasury Green Book, 2022

The 5 Case Model

Strategic dimension	What is the case for change, including the rationale for intervention? What is the current situation? What is to be done? What outcomes are expected? How do these fit with wider government policies and objectives?
Economic dimension	What is the net value to society (the social value) of the intervention compared to continuing with Business As Usual? What are the risks and their costs, and how are they best managed? Which option reflects the optimal net value to society?
Commercial dimension	Can a realistic and credible commercial deal be struck? Who will manage which risks?
Financial dimension	What is the impact of the proposal on the public sector budget in terms of the total cost of both capital and revenue?
Management dimension	Are there realistic and robust delivery plans? How can the proposal be delivered?

Source: HM Treasury Green Book, 2022

Funding and ‘Making the Case for Bus’

The National Bus Strategy set an ambitious vision to transform the quality of bus services in England. It set 12 key objectives to help achieve this, as well as information on delivery plans. To help realise these, it unlocked several rounds of funding.

With the potential for further funding beyond 2025 to be unlocked, it is **crucial that LTAs are aware of how to best capture Social Value within their proposals as well as how to make the wider ‘Case for Buses’**. This will be useful not only for bidding for central government funding, but also for internal funding within LTAs as well as to communicate investment decisions with the wider public.

A note on proportionality

Whilst it is expected that funding proposals for bus service improvements are aligned with TAG on business cases, the principle of **proportionality** applies.

This means that the level of detail at each stage must be in line with the spending required. Normally, as bus improvement schemes are not expected to be as big as other major transport infrastructure schemes (in relative terms), we can usually go through a streamlined process of business case development instead of a Full Business Case. For example, at the first rounds of funding from the NBS, which required the development of BSIPs, the individual schemes within these were initially assessed as an equivalent to a Strategic Outline Business Case (SOC), with the caveat that further assessment was to be required at later stages.

Through this process, the Strategic and Economic dimensions pose significant opportunities for the incorporation of Social Value.

The **SOC should set the strategic case, as well as full economic and financial appraisals** to select a preferred way forward. Where relevant, preparations are made for the potential contract through the development of the commercial dimension. The arrangements required to ensure successful delivery are set out in the management dimension.

[Link to DfT’s ‘small scheme appraisal toolkit user guide’](#)

[Link to TAG Unit for the Technical Project Manager, which includes a note on proportionality](#)

Funding and ‘Making the Case for Bus’

The Strategic Dimension

The Strategic Dimension looks at making the case for change, which implies understanding our current situation, where we want to get to, and how the proposed scheme can help bridge that.

The development and validation of a **Theory of Change model** early in the process is key to record this process as well as to expose the strength of existing evidence.

Overall, the logic model should register the identification of the existing conditions and how the investment into the proposed scheme, as well as its Outputs and Outcomes will help achieve the expected ‘Impact’.

Link to the Magenta Book (see chapter 2.2.1. ‘Understand Theory of Change’)

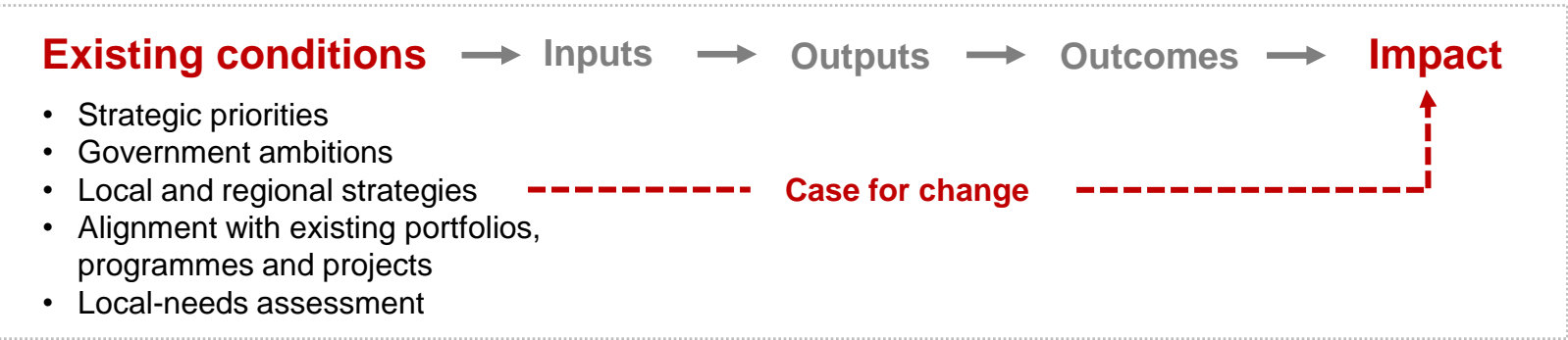
To maximize the potential benefits to society, it is crucial that Social Value considerations are embedded from the start, when developing the understanding of existing conditions.

To the right, there are a few initial questions to explore. As mentioned in the passenger representation section, it is key to consider how data gaps can be bridged via additional targeted research and engagement.

Overall, the development and validation of existing conditions should also serve as a starting point for identifying the desired impact and setting up the strategic objectives for investment. This will help develop a socially-relevant ‘case for change’.

Once the starting and end point have been defined, we can review which alternatives are the most suitable to enable the change to happen.

- ❑ What’s the general information that we have on the local area? E.g, data on the bus network and the roads they run on (congestion, noise, air quality, accidents), data on land use distribution, spatial development patterns, socio-economic indicators, etc.
- ❑ What information do we have on current bus passenger experience? E.g. journey time, reliability, patronage, and passenger satisfaction.
- ❑ What information do we have on how groups of protected characteristics experience travel? What are their main barriers and opportunities?
- ❑ What’s the current relevant National, Regional and Local Policy? For example, the National Bus Strategy (with particular focus on the 12 strategic objectives), Levelling Up agenda, Decarbonisation, PSED, etc.



Funding and ‘Making the Case for Bus’

The Economic Dimension

“The economic dimension involves the appraisal of options to understand their potential costs and benefits, taking into account the uncertainty around these impacts.” (TAG, 2013)

The Economic Dimension measures the net value to society compared to Business As Usual (BAU). This value assigned will be a key factor when deciding the ‘preferred way forward’. As such, it is key that the different dimensions of Social Value can be adequately registered.

Whilst there are some good benchmarks on which factors can be considered when assessing the value of schemes, it will be crucial that LTAs consider the latest data as well as local conditions when developing context-sensitive assessments that can account for the full range of benefits from investment.

There are different benefits that can arise from the appraisal of investment in bus priority measures.

The small-scheme appraisal provides guidance on the production of monetised assessments of bus journey time and bus journey quality. Additionally, it considers wider impacts of bus schemes associated to change of highways kilometres travelled, considering impacts around congestion, infrastructure, noise, air quality, accidents, greenhouse gases and indirect tax.

Whilst this is useful in capturing the monetised cost and benefits investment (in the form of an **Analysis of Monetised Costs and Benefits** (AMCB) table), it **does not capture the full economic value of the intervention**.

While it is not expected to conduct the full modelling of economic, environmental and social and distributional impacts of transport investment for bus schemes, it is useful to record these considering the principles of **TAG units A2, A3, and A4**. These outputs should also be material considerations when assessing options for investment.

“while CBA forms an important part of the transport appraisal, it is only one element of what is effectively a multicriteria analysis.” – TAG, 2023

Case Study – Monetising wider benefits of bus

A report by KPMG (2017) calculated a £4.90 Benefit Cost Ratio (BCR) for investment in bus priority measures under the right circumstances. This was assessed by considering:

- User benefits of journey time savings (£1.90)
- Non-user benefits, including reduced externalities due to mode shift from car to bus (£0.37), and a linked reduction in fuel tax revenue (-£0.14)
- Bus operator benefits (£0.09)
- Wider economic and social benefits (**£2.72**)

The report also evidences the additional value delivered to certain groups of protected characteristics by disaggregating data on passenger type. As such it found the following returns for each £1 of revenue invested:

- Concessionary travel for older and disabled people (£3.80).
- Concessionary travel for apprentices (£2.70).
- Tax incentives for commuters (£2.00).

KPMG. The ‘true value’ of local bus services’

Greener Journeys. The Value of Bus to Society

Measuring value in Community Transport

Community Transport plays a vital role in delivering value to society, particularly for communities that may otherwise be overlooked by traditional services.

While the knock-on benefits from these services can often be discussed anecdotally, being able to more consistently articulate the strategic narrative around these becomes important for the development of business cases. Similarly, being able to measure their value for money becomes a significant opportunity, as this is a key factor driving public sector spending decisions.

In acknowledgment of this, Ealing Community Transport has conducted significant explorations into how to best record the value of community transport. Relevant reports are outlined to the right.

Why Community Transport Matters

Examining evidence on the role of community transport services in enabling older people maintain active community participation. In addition to developing a thorough strategic narrative, the report includes calculations of estimated cost savings to society.

[Link to CT report: Why Community Transport Matters](#)



Note: As further research and evidence becomes available on the role that community transport plays in delivering social value, we can expect to see more advancements in the development and refinement of measurement methodologies.

It is recommended that stakeholders with a role in the planning and operation of transport networks continue to engage with these developments. By doing so, we will be able to ensure alignment with desired outcomes and optimize the benefits derived from integrated networks.

Measuring UP: The CT Social Value Toolkit, 2018



Further advancing the research and methodology developed at the 'Why Community Transport Matters' report, ECT developed a CT Social Value Toolkit: A Practical Guide for Measuring Social Value in Community Transport. This toolkit helps bring consistency in measurement by offering a clear, step-by-step methodology outlined in a practical guide. Additionally, it includes a calculator and an Excel model to facilitate the process.

[Link to CT Social Value Toolkit](#)

Limitations and new approaches to transport business cases

Limitations

Whilst Social Value considerations and the value delivered by buses both continue to climb higher in the public and decision-making spheres, there are still many challenges to properly capture and communicate the full net value to society.

In order to devise ways for improvement, it is crucial to first recognise key existing limitations. The following are a few initial considerations. It is encouraged that LTAs consider how these apply to their own local areas and which others might be important to note.

Developing and integrated narrative: Often strategic narratives and economic case analysis are disjointed. There is a need for better storytelling backed by evidence.

Data: There is often limited data for demonstrating social value benefits. Data is rarely disaggregated by groups of protected characteristics, making it challenging to understand their specific travel needs and expectations. Data also needs to be locally relevant to maximize social value delivery, which will often require additional primary research at the local scale as well as continuous and meaningful engagement.

Accounting social benefits: Full range of social benefits can be difficult to account for or monetise in business cases or funding bids.

Weighting and balancing priorities: Traditional appraisal metrics can place higher value to measures around patronage, travel time savings and congestion reduction among commuting routes or for users who might not be at most disadvantage. Within a context of limited resources, it is crucial to capture and weight other social value benefits from investment towards the wider strategic priorities.

Underscored cross-sectoral investment: While there are designated funds for buses, additional investment opportunities can be explored by linking bus contributions with cross-sectoral policy-objectives. An Urban Transport Group report effectively summarises the contributions of buses towards:

- The economy - Supporting urban and rural local economies and high streets, enabling access to employment, increasing productivity through reduced congestion, etc.
- Social mobility – A tool for social policy by benefitting groups of protected characteristics whilst increasing access to a wider range of opportunities
- Building community – Unlocking transit-oriented development, place-making, connecting communities, supporting volunteering activities, development of social capital, etc.
- Health and wellbeing – First and last mile activity, access to health, reduced costs to the NHS, etc.
- The environment – Reductions in GHG emissions from mode-shift and from reductions in congestion.

Urban Transport Group. The cross-sector benefits of supporting bus services

Limitations and new approaches to transport business cases

New approaches and opportunities

There are some changes that are helping to counter-balance the identified challenges.

The main opportunities at the national level arise from wider reviews to the appraisal process, increased research and availability of data, as well as shifts in policy, social priorities and associated funding.

As noted in the previous page, it is recommended that LTAs also conduct localised explorations of opportunities within their areas of influence.

[Link to the 2020 Green Book Review](#)

[Link to the Spending Objective Analysis Unit](#)

Green Book Review 2020 and new Spending Objective Analysis Unit

The 2020 Review recommends:

- Stronger focus on strategic narrative and demonstrating that the proposal's objectives align and contribute to wider strategic objectives
- The VfM assessment and BCR should support the case for the preferred option and align with strategic objectives
- Place-based impacts should be measured and presented alongside UK-level appraisal
- Appraisals should better capture transformational change, environmental impacts and distributional impacts.

One of the ways this is being applied is through the introduction of the Spending Objective Analysis. In November 2023, TAG introduced this new unit which aims to support improved connections between the economic and strategic dimensions of business cases by “allowing a more structured and consistent presentation of evidence across the two dimensions.” Evidence can be presented through a Strategic Objective Assessment Statement (SOAS). This is an opportunity to summarise and present key messages for decision-makers, alongside with the value for money statement to inform the investment decision.

Data and Strategic Narrative Development: This toolkit already presents a good range of data sets and reports that bring the focus back to passengers and specially to those currently at most disadvantage.

Additionally, the BSIP programme is undertaking a Monitoring and Evaluation project which will provide further insights into the outcomes that bus service improvements are unlocking. (see next page)

Shifts in policy and social priorities: Increased focus on decarbonisation, levelling up, place-based development and economic growth, equitable development, healthy communities, etc.

Whilst the political landscape and the naming of priorities might evolve, organised society, powered by community-based action and a future-generations approach is increasingly concerned with securing welfare at the local level whilst acknowledging implications to wider society and the planet. Buses become a key ally to unlock this type of social benefits at the local scale whilst helping tackle wider sustainable development challenges.

Insights from monitoring and evaluation

As part of the BSIP / NBS programme, there is a plan underway to Monitor and Evaluate the interventions funded.

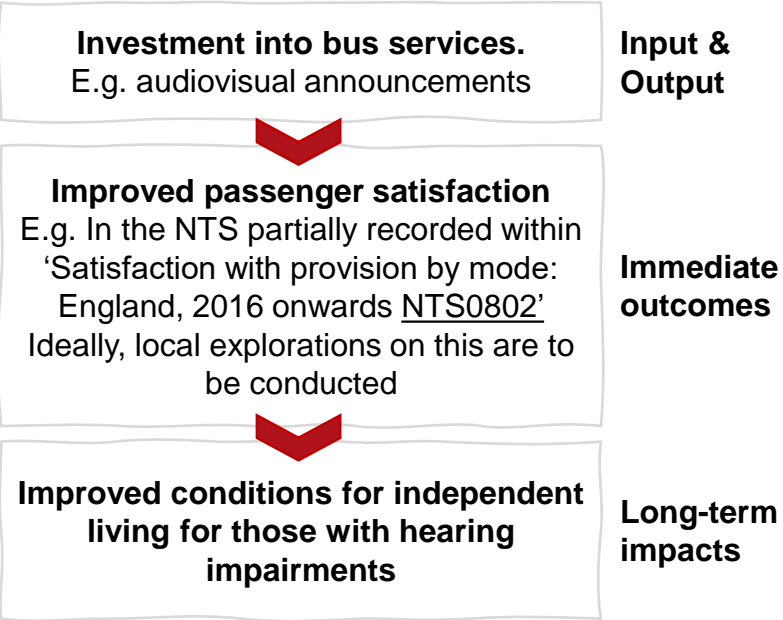
The evaluation mainly focuses on 4 key outcome metrics which have been devised in line with the overall goals of the NBS. These are: bus journey time, reliability, patronage, and passenger satisfaction.

Whilst these represent immediate changes that will probably start to be observable in the timeframe of the evaluation, it is key to also recognise the wider long-term outcomes that investment into bus services can bring. In line with the objectives of the National Bus Strategy and wider commitments to Social Value, an important area of exploration at the local level would be to examine how this investment may impact different groups and how this contributes towards equitable outcomes.

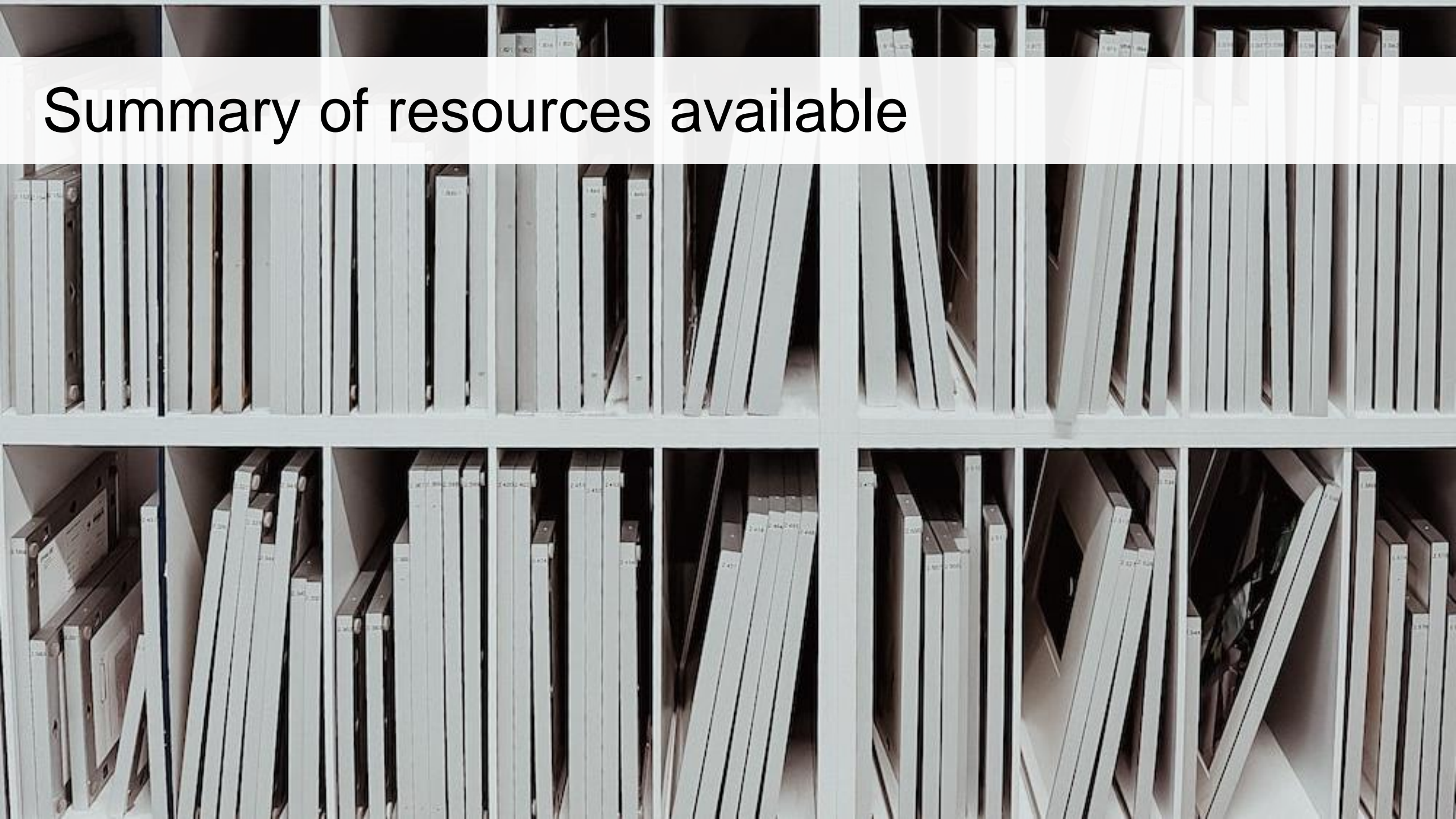
- Process:** Using mixed methods to ensure robust data triangulation from different sources:
- Theory based approach: Fieldwork and rapid evidence assessment.
 - Quantitative evaluation: Monitoring of data on the 4 key outcome metrics, as well as wider datasets.
- Final product:** The final product of the programme will result in a report that includes:
- Process evaluation – Barriers and opportunities for the implementation of interventions
 - Impact evaluation – Including a Theory of Change Evaluation, an evidence-based narrative of the contribution of the bus interventions to the outcomes observed.
 - Case studies
 - Value for Money - Social cost-benefit analysis to the extent feasible, recognising that some outcomes will not be observable within the timeframe of the evaluation so outcomes will be simulated forwards in scenarios to demonstrate the potential value for money and what would need to be believed for benefits to materially outweigh costs.

The opportunity: These products will bring valuable data to inform the strategic planning of bus service improvements. It will be key for LTAs and decision-makers to take time to reflect on how immediate outcomes can start unlocking the long-term impacts prioritised for their local areas.

The development of a logic model is highly advised, ideally acknowledging local data and through consultation with key stakeholders.



Summary of resources available



Links to resources available

Key resources

Inclusive Transport
Strategy (DfT, 2018)

Transport Related Social
Exclusion (TfN, 2022)

Bus Centre of Excellence
(CIHT)

Bus and coach
accessibility and the
Public Service Vehicles
Accessibility Regulations
2000 (DfT)

Bus Centre of
Excellence. Relevant
Free Access Modules
(CIHT)

Guidance for frontline bus
staff (DfT & Transport for
All, 2021)

REAL training – bus and
coach modules (DfT,
2020)

National Travel Attitudes
Study Wave 8 (DfT, 2023)

‘It’s everyone’s journey
campaign’ (DfT)

Increasing bus patronage
through an audience
strategy (DfT & Yonder,
2023)

Other relevant resources (1/2)

Passenger representation
on Bus Service
Improvement Plans
(Transport Focus, 2021)

Passenger charters for
Bus Service Improvement
Plans
(Transport Focus, 2021)

10-point guide: Bus
Service Improvement
Plans (Bus Users, 2022)

Quick guide: Setting up a
BSIP/EP group (Bus
Users, 2022)

Delivering Better Bus
Services, A Toolkit for
Engaging with Local
Communities
(Confederation of
Passenger Transport UK)

Bus passenger
satisfaction – key driver
analysis (Transport Focus,
2023)

Getting free bus pass
holders on board
(Transport Focus, 2023)

How bus users spend
their journey time
(Urban Transport Group,
2019)

What scope for boosting
bus use? An analysis of
the Intrinsic Bus Potential
of local authority areas in
England (Urban Transport
Group, 2019)

How people respond to
the experience of bus
travel and the implications
for the future of bus
services (Urban Transport
Group, 2019)

What's driving bus
patronage change? An
analysis of the evidence
base (Urban Transport
Group, 2019)

Links to resources available

Other relevant resources (2/2)

The cross-sector benefits of supporting bus services (Urban Transport Group, 2019)

The 'true value of local bus services' & Greener Journeys, 2017)

The Value of the Bus to Society (Greener Journeys, 2016)

Fair bus fares for young people. Policy briefing (Sustrans, UWE Bristol, the Health Foundation, 2022)

Equitable Future Mobility (Urban Transport Group & Arup, 2022)

Connecting communities: improving transport to get 'left behind' neighbourhoods back on track (APG, 2021)

Planning journeys. What transport users want from a journey planning tool (Transport Focus and Traveline, 2021)

GET IT. Gender Equality Toolkit In Transport

Improving safety when travelling (Bus Users, 2022)

ENOUGH Campaign (Gov. UK)

Transport Champions for Tackling Violence Against Women and Girls: Recommendations to make our transport networks safer for women and girls (Transport for West Midlands, 2022)

Campaigning on Talking Buses (Guide Dogs UK)

PAS 6463:2022. Design for the mind – Neurodiversity and the built environment – Guide (The British Standards Institution, 2022)

Review of the Public Service Vehicles Accessibility Regulations 2000 (DfT, 2023)

Accessible Public Realm: Updating Guidance and Further Research. Overview and recommendations (DfT, 2020)

Inclusive Mobility. A Guide to Best Practice on Access to Pedestrian and Transport Infrastructure (DfT, 2021)

Making buses more accessible through design – presentation (Bus Users, 2019)

Bus Stop Design Guide (Translink, 2005)

Inclusive Journeys. Improving the accessibility of public transport for people with sight loss (RNIB, 2023)

Seeing streets differently: How changes to our streets and vehicles are affecting the lives of blind and partially sighted people (RNIB, 2021)

Aural Diversity Toolkit (Arup, 2024)

'Aural Diversity Infographic' (Hugill, A. 2022)

Summary – Actionable points



Summary – Actionable points:

This section includes practical recommendations for you to consider at different stages of developing bus interventions. It includes top tips as well as some indications on potential roles for delivery. However, it is key to note that whether you are a Local Transport Authority, an operator or any other stakeholder, we all play a role in advancing social value and equalities of opportunities. It is therefore recommended that these can be reviewed jointly through multi-sectoral engagement.



Summary – Actionable points:

1. Strategic Alignment

☐ Familiarise / refamiliarise yourself with the Public Sector Equality Duty (Equality Act 2010)

- If you are an LTA – remember this is your duty. Consider how current activities are contributing towards this and where tangible improvements could be made in the short-term as well as in the long-term (by further embedding into wider plans and strategies).
- If you are an operator – as a deliverer of services to the public, you can play a critical role in advancing equality of opportunities.

☐ Consider incorporating elements of the Procurement Policy Note (PPN) 06/20

Whilst PPN 6/20 relates to the delivery of social value through central government contracts, there are opportunities that could arise from considering how other types of contracts could also incorporate elements of social value especially in areas around recruitment, opportunities and retention for diverse workforces.

- If you are expecting to contract a new service or extend an existing one, how could you include these considerations more explicitly in the award and the delivery of the service?

☐ Assess current alignment with the Inclusive Transport Strategy

Considering the target for ‘disabled people to have the same access to transport as everyone else by 2030’.

- Is your local area on track to achieve this? Which changes would need to be made?

☐ Familiarise / refamiliarise yourself with the social disability model.

- What are the main barriers that vulnerable groups in your area report? What can you prioritise for the upcoming service improvements?

☐ Familiarise / refamiliarise yourself with the “it’s everyone’s journey” and the ‘Enough’ Campaigns

Including the resources and user stories available.

- Look at the feedback collected on your existing services and data available in your local area (link with the next step). What relevant user stories can you identify in your local area?

Explore these question with relevant groups, ideally ending up with a **co-designed roadmap that works towards the target of equal access to mobility**

Summary – Actionable points:

2. Appropriate evidence-base

❑ Assess the data

That you have on groups of protected characteristics within your local area (both in terms of quantity and quality).

- A conversation between LTAs, operators and any other locally relevant associations can be useful to better understand how different groups might experience transport in your local area. You might decide to focus on the groups included within this document or you might want to develop your own segmentation based on local conditions.

❑ Formulate a strategy for conducting targeted, locally-based passenger research to address identified gaps

This strategy should consider alignment with strategic priorities, proportionality, and the exploration of potential partnerships.

A well-defined strategy streamlines the process of incorporating social value into funding proposals and other revenue-generating initiatives.

Also consider that often this research and engagement won't be a one-off exercise, but that will require of continuous engagement with specific groups.

Supporting activities can include:

- Periodic public surveys (wider-reach-out)
- Adequately balanced passenger representation boards and focus groups, with periodic meetings and input of recommendations into both service coverage (routes, frequencies, etc.) and travel experience (safety, comfort, accessibility, etc.)
- Assessment of feedback submitted to operators (this will require coordination regarding data rights and GDPR)
- Ideally, Local Authorities should take the lead in the setting, delivering and monitoring of the strategy, however, the input from operators and other relevant local groups will be key to support the data collection, and therefore should be involved in the co-design of the strategy. Regular communication should be maintained to incorporate relevant adjustments.

❑ Ensure ongoing reporting and traceability

On how passenger data and recommendations collected feed into service improvements and prioritisation of measures. Data acquires further value when it is considered in decision-making.

A repository of equities data can support different stakeholders incorporate and make the case for social value within their schemes

Summary – Actionable points:

3. Service planning



Network planning:

☐ **Develop persona-informed planning**

- If you are an LTA – you might decide to take the lead on the development of ‘personas’ to inform wider strategy setting and network planning. It will be important to involve operators, who have the direct engagement with users, to ensure these personas are representative of the local context
- If you are an operator – you are also encouraged to consider these personas when planning your services and any planned changes or temporary disruptions. How might these impact different people both positively or negatively? Which mitigation measures can be considered against potential negative impacts?

☐ **Integrate planning for social need within wider network planning.**

Integrate planning for social need within wider network planning. Considering how subsidised and community-based services are sustained alongside revenue-supported services.

Fares and ticketing:

☐ **Promote integrated-ticketing**

If measures towards this are already be in place or in development, consider how you can further advertise them to target groups. E.g. focused outreach campaigns.

☐ **Introduce ‘hopper’ fares**

This measure offers significant benefits to users from diverse backgrounds, particularly those belonging to groups with protected characteristics, who are more likely to engage in trip-chaining and may have heightened concerns about transportation costs. However, these fares also provide considerable value to the broader customer base and have the potential to attract new users

☐ **Assess travel discounts**

(concessionary travel, discounts to younger age groups, family discounts, off-peak travel discounts, etc.)

- Evaluate the data of usage of these discounts, as well as the feedback collected from passengers to jointly consider what are the current strengths and gaps of the existing discounts. How can these inform future priority planning?

Summary – Actionable points:

3. Service planning

Accessible information and journey planning:

☐ **Deploying journey planning tools for personalised multi-modal planning**

Explore the deployment of journey planning tools for personalised multi-modal planning. Explore additional functionalities such as including information on fares and discounts, as well as enabling configurations for accessing more personalised advice and support if needed.

- If you are an LTA – you can play a critical role in supporting the integration of information for different services operating in your local area (e.g. micromobility, buses, etc.)
- If you are an operator – it will be key to ensure real-time information on your services. This helps build further trust in passengers on the reliability of services and can increase ridership

☐ **Accessible information at stops and within buses**

Audio-visual, clear language, graphics, digital and printed.

☐ **Clarity on how to access remote assistance**

Develop clear and inclusive processes and ensure these are adequately disseminated.

- For example, through displays at bus stops and within buses.

☐ **Outreach campaigns to build confidence on using buses**

- For example, working with schools, universities, disability groups, community centres, etc.

Wider environment:

☐ **Assess the full route to/from the stop**

Ensuring these are accessible, enjoyable, and welcoming to different groups.

- For example, you might want to consider safety and wider placemaking. You might also want to go on site and evaluate these routes with representatives of diverse disability groups

☐ **Assess the quality of stops**

Specially those near key attractors, community services, and areas where services are not very frequent.

Ensure these are comfortable (seating, shade/shelter, adequate lightning technique), and welcoming (including opportunities for passive overlooking and place-making).

- If you are a LTA, you might want to take the lead on this, but you should be open to conduct these evaluations in partnership with local stakeholders and operators

Summary – Actionable points:

3. Service planning

Bus design:

- ❑ **Ensure multiple-doors and adequate mechanisms for safe and convenient boarding/alighting**

Following wider guidance referenced in this guide and testing it against diverse user requirements and expectations for the network operations

- ❑ **Install lower grab rails or handles**

Helping children maintain their balance as well as wheelchair users find support onboard

- ❑ **Ensure 2 accessible spaces as minimum**

Reducing any potential conflict between enabling a user with mobility impairments or a caregiver with a pram from boarding the bus.

- ❑ **Integrate charger points**

Especially next to priority spaces

- ❑ **Integrate assistance request buttons**

Especially next to priority spaces

- ❑ **Secure accessible information**

Including well-tested audio-visual announcements, as well as properly sized fonts for announcements on display. You might also want to consider integrating graphics and recognisable symbols.

➤ If you would like to make your services more accessible and enjoyable, you might also consider adding accessible or child-friendly maps of stops within your service. Similarly, you could add QR codes where people can access information about their journeys on different languages.

- ❑ **Ensure adequate lightning and bright floors**

- ❑ **Consider other aspects that contribute to an enjoyable environment**

Including: cleanliness of services, large windows, entertainment options (e.g. local landmarks maps to make the journey informative and fun)

Summary – Actionable points:

4. Delivery and operations



☐ Improving equality of opportunities within your organisation

- For example, consider how is your organisation ensuring your workforce is as diverse as the public you serve? How are development opportunities being promoted? Is there any good practice that can be captured from this?

☐ Undertake the disability awareness training

Link to DfT's REAL training for bus and coach [here](#).

- Whilst this training includes resources particularly relevant to operators, it is highly encouraged that LTAs and other stakeholders with an interest in the topic of also undertake this training as it includes some very valuable insights.

☐ Ensure friendly, considerate and consistent bus staff

Greeting at boarding / alighting, offering support (physical support, information, etc.), ensuring passengers are seated before moving, consistency of drivers along corridors (where possible).

☐ Trained drivers and support staff on dealing with incidents of harassment and discrimination

Include periodic reviews of the training provided.

- You might also want to keep an eye on latest national guidance and recommendations, as well as exploring what local stakeholders and campaign groups are doing in this space.

☐ Promoting a community of support

Consider the development of campaigns to raise awareness among passengers of the needs of elderly people, children on-board, people living with a disability, etc. Also, consider campaigns that build on the collective role of the public to ensure an enjoyable travel experience for all, including the different roles that people can take to also ensure welcoming environments for women, LGBTQ+, ethnic minorities, and others who might be at special risk of suffering from harassment or discrimination

- Remember - Advancing equality of opportunities requires a collective effort. Partnership working is key!

This toolkit aims to open up conversations on social value delivery. However, this is a collective and ongoing task for which we would appreciate your support, in particular with **recording and sharing good practice**.

Email the BCoE, Liani Baglietto and Carl Sutcliffe if you have a successful experience or initiative that you would like to share.