



**Connected
by design**

GoAhead



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Foreword

Ask anyone what they want from public transport and they will almost always tell you that they want fast, frequent, reliable and affordable services. They want public transport that provides a seamless experience, that's convenient, accessible and thoughtfully designed.

Integrated transport, the joining up of services, tickets, information and infrastructure around the journeys people make, is one of the most powerful tools available for creating economic and social opportunity. It determines whether people can access work, education and healthcare. It shapes whether communities thrive or fall behind.

Yet the opportunities presented by integrated transport cannot be delivered by any single organisation alone. They require operators, local authorities and government to share a vision for a better network and deliver on it. We have been building the case for integration and delivering it in practice, with partners, for decades.

This report draws on the experience of our operators to show what integration can deliver when done well, what the building blocks are that make it possible and most importantly, what is required to accelerate integration right across the country so every community can benefit. The best examples in this report are not stories of any one organisation acting alone, they are the product of councils, operators, communities and developers working together around a common goal.

The opportunity is clear, and so is the task ahead. We invite operators, local authorities and government to work with us to turn the case for integration into reality, so that every community can benefit from a transport network designed around the lives people actually lead.



Matt Carney
CEO, Go-Ahead Bus

The case for integration

This report comes at a moment of genuine political momentum. The government's Integrated National Transport Strategy, *Better Connected*, signals a commitment to transport planning that prioritises seamless journeys across modes rather than managing individual networks in isolation. For the first time, integration is not just an aspiration in the background of transport policy but the stated ambition at its centre.

That ambition reflects something real about where the country is. Across Britain, integrated transport is already working, not uniformly, and not everywhere, but in ways that demonstrate what is possible. The North East has had multi-operator ticketing across bus, Metro and ferry for thirty years. In Oxford, there has been a 10% increase in bus patronage after the introduction of a congestion charge, and in Cornwall, rural communities are connected to the national rail network through an integrated bus and ferry model that the Department for Transport itself has recognised as a standard for others to follow. These are sustained, mature examples of what integration can deliver and they provide the foundation on which a national approach can be built.

The baseline, however, is not good enough. Despite investment in individual modes, Britain's public transport network is in many ways fragmented, with real and lasting consequences. The UK is a country in which the car has become not a choice but a necessity for millions of people – not because people prefer to drive, but because the alternative is too often not genuinely viable.

The consequences of disconnection too often fall on those with the least. 22% of households in England do not have access to a car, a figure that rises to 40% for those with lower incomes¹. For these households, a fragmented public transport network is even more of a structural barrier to employment, education and healthcare.

The economic and social cost of this is significant, with poor urban public transport connectivity costing the UK economy more than £23 billion every year in lost economic activity². That represents millions of journeys not made, jobs not reached and opportunities missed. The flip side of that figure is equally striking — Centre for Cities research published in 2025 found that delivering integrated transport across the six largest English cities outside London alone could generate an additional £17 billion in annual economic output³. However you look at it, the scale of potential if an integrated transport network existed in every corner of the UK is enormous. The appetite for better, more integrated public transport is overwhelming. 79% of drivers say they would use public transport more if it were better⁴. When the Department for Transport held its regional engagement roadshows ahead of releasing the *Better Connected* strategy, the most frequently mentioned aspiration was for a transport system that is truly connected across modes and places, with seamless end-to-end travel, better links between bus and rail, and integrated ticketing⁵. Participants called for journeys that are relaxed, stress-free and confident to use, precisely the qualities that integration, done well, delivers.

The most positive views of local public transport quality are held in urban areas which are operating integrated transport systems, like London's⁶. The task ahead is to extend that experience beyond the country's largest cities and the evidence in this report demonstrates that the tools to do so already exist.

¹ Urban Transport Group, *A Landmark Year for Local Transport*, December 2025. ² Centre for Cities, *Measuring Up: Comparing Public Transport in the UK and Europe's Biggest Cities*, November 2021. ³ Centre for Cities, *Integrated Transport: The Size of the Prize for Mayors*, November 2025. ⁴ Campaign for Better Transport, survey conducted by YouGov, November 2023. ⁵ Department for Transport, *Better Connected: A Strategy for Integrated Transport — Policy Engagement Summary Report*, April 2026. ⁶ Ipsos, *Public Services 2025: Transport*, 2025



To do physical integration well, we must think beyond individual modes and instead design for the complete journey.

The building blocks

Integrated transport does not happen by accident. It is the product of deliberate decisions, made by multiple parties over many years, to build the conditions in which different modes of transport work together rather than alongside each other, all in the interests of making the passenger experience better.

Some of the building blocks to integration are physical, like the bus stop placed where people actually need it rather than where it was convenient to put it. Some are technical, for instance the technology that allows a passenger's contactless card to work on any operator's bus. Some, like the necessity of shared vision between an operator and local authority, are relational. While some are about timing, ensuring the operator is in the room when a development is being planned.

These building blocks work best when they happen together. Otherwise, having physical infrastructure but no shared ticketing, creates a network passengers can see but not easily use. Similarly, technology without a shared vision produces a fractured network. Integration, done well, requires all elements to be present and reinforcing.

Physical integration

Physical integration starts with simply putting the right things in the right place - a bus stop yards from a railway platform, a coach bay adjacent to a ferry terminal, clear signage that tells people arriving by train exactly where to go next. These are not glamorous interventions, but they are the foundation of a transport network that works for its passengers.

To do physical integration well, we must think beyond individual modes and instead design for the complete journey. That means always thinking about where passengers might need to go next and designing every interchange, every stop and every piece of signage around that question.

When passengers can see their onward connection the moment that they step off their train, the network feels like one system that is easy to use. The evidence shows that when public transport is easier to use, more people use it, which generates more income, in turn allowing for greater investment in the services themselves, and on the virtuous circle continues.

CASE STUDY

THE MULTI-MODAL HUB THAT KEEPS BOURNEMOUTH MOVING

Bournemouth Interchange is one of the best examples of physical integration in the South of England. Step off a train at Bournemouth station and the interchange is immediately outside. From a single point, passengers can access over 30 Morebus routes serving the wider conurbation as well as coaches connecting to London and beyond. For passengers arriving from London by coach, or departing by train, the interchange removes the need to navigate between separate facilities on opposite sides of town, which is a friction point that, in many other towns, is enough to push people back into their cars.

Services here also scale with demand. Routes which serve the coastal and tourism corridor increase in frequency during summer months to accommodate the significant visitor numbers the region attracts. The fact that those visitors can step off a train and immediately access an open-top bus to the coast is not accidental, it is the product of deliberate physical planning.

Bournemouth Interchange is also a story about what happens when a local authority invests in infrastructure and an operator commits to using it. The facility has been significantly upgraded by Bournemouth, Christchurch and Poole Council, transforming what was previously a congested and poorly arranged space, much of which was car parking, into a proper multi-modal hub with dedicated stands, real-time passenger information screens and space for every mode to operate effectively.

The design of the interchange also explicitly accommodates taxis and private car drop-offs alongside buses and coaches, recognising that seamless integration means planning for all modes of travel. The result is an interchange where passengers arriving by any means can make their onward connection with ease.

Morebus was a consultee throughout the redesign process, ensuring the final layout worked for buses operationally as well as for passengers practically. The relationship between council and operator in delivering the interchange is itself a model for public investment, with local government leading the way combined with operator commitment to the services, making the investment worthwhile.

CASE STUDY

THE NEW SALISBURY INTERCHANGE

Bournemouth's scale makes it an exceptional example, but the principle rings true on a smaller scale too. The newly built Salisbury Interchange shows the same model operating at a different scale, with equally compelling results.

Salisbury station previously had no meaningful bus interchange, with services terminating in the town centre rather than at the station, a consistent barrier to integrated travel. Wiltshire Council invested in a brand new interchange directly at the station, transforming what had been a car-dominated space into a proper multi-modal hub with dedicated bus stands and real-time passenger information. Passengers arriving at Salisbury by train can now immediately see which services are departing and when, removing the uncertainty that would otherwise be a barrier for those wanting to continue their journey by bus.

The operator commitment followed immediately, with Morebus extending its X3 service to terminate at the new interchange rather than in the town centre, giving passengers a direct, seamless connection to the national rail network. This service now runs every 30 minutes, alongside the X4 which goes to the nearby towns of Amesbury and Larkhall every 30 minutes. For places on these route which have no railway station of their own, this connection is the primary means by which its residents access the national rail network. Smaller in scale than Bournemouth, Salisbury nonetheless demonstrates the same truth: invest in the right infrastructure, commit to the services that use it, and the whole network gets better.

Data and technology

Data and technology are the nervous system of integrated transport. While physical infrastructure and timetable coordination create the conditions for integration, data and technology also have a role in making transport easier to both use and understand. For instance, a real-time departure screen that shows when the next bus leaves could be the difference between a passenger waiting for the bus, and giving up and calling a taxi.

Getting data and technology right is about more than simply installing screens, it is about shared ticketing systems that work across competing operators, contactless payments that function reliably regardless of which bus arrives first and journey planning tools that enable passengers to feel confident in how they're getting to their destination.

The scale of what data and technology enables is also important. Go-Ahead alone processed 70 million contactless transactions on its buses outside London and Manchester in 2025, the vast majority using tap-on tap-off technology that calculates the fare automatically and applies the daily cap, where relevant. That is 70 million moments where the friction of payment was removed so the passenger could simply board and go.

At the same time, data and technology are helping operators to design networks that reflect how people really travel, rather than making assumptions. This is less visible than a departure screen or contactless payments but just as crucial in creating a network that works for passengers.



Invest in the right
infrastructure, commit to
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Oxford Bus Company and Stagecoach established a mechanism for coordinating services on four of Oxford's five key corridors.

CASE STUDY**HOW SHARED TECHNOLOGY MADE OXFORD'S BUS NETWORK BETTER**

The story of Oxford's SmartZone ticket begins with two bus companies racing each other to the same stops. For years, Oxford Bus Company and Stagecoach, each holding around 50% of the city's bus market, scheduled their services to compete on the same corridors, each trying to pick up passengers before the other. The result was predictable, too many buses clogging the historic city centre, a waste of resource and ultimately, a worse experience for passengers.

Faced with an increasingly congested city centre, the message from the council to operators was direct: coordinate your services and reduce bus numbers voluntarily or face restrictions. The bus companies chose collaboration, and a new SmartZone model was the thing that made it possible.

Oxford Bus Company and Stagecoach established a mechanism for coordinating services on four of Oxford's five key corridors. Services were co-ordinated so that every other bus was Oxford Bus Company and every other was Stagecoach, and both operators converted their fleets from single-deckers to double-deckers. This meant that passengers got a better, more reliable service with less waiting and the city centre got fewer buses and more space.

However, coordination of services only works if passengers can use whichever bus arrives first. SmartZone provided that with a shared ticket that works across both operators. The scheme launched in 2011, starting with paper tickets and plastic smart cards before evolving into app-based products, while keeping the original channels open for passengers who prefer them. A joint venture company between Oxford Bus Company and Stagecoach acts as a clearing house, with revenue allocated between operators based on agreed market share principles.

SmartZone reached around 5 million journeys a year almost immediately after launch and has grown to over 6 million journeys a year, a level it has maintained consistently for more than a decade. On top of high usage stats, research conducted in 2014 found that SmartZone users reported high satisfaction with both value for money and convenience, and critically, having a SmartZone ticket meant passengers used the bus more often than they otherwise would.

SmartZone is now fifteen years old and still growing. What SmartZone demonstrates is that the hard part of integrated ticketing is not the technical infrastructure, it is getting competing operators to the table, establishing a framework they can all trust, and designing a product that passengers actually want to use. Oxford did all three, and the results have endured.

Shared vision

Another important building block to creating an integrated transport system that works for passengers is a genuine, sustained commitment between government, local authorities and operators. Without a shared vision, the building blocks don't connect, a new bus interchange is built but the operator has no commitment to run services through it or a route is funded but the road conditions that would make it viable are never delivered.

Building genuine alignment is not easy and it is hardest to achieve where the interests of different parties are not naturally aligned. For instance, this is often the case with competing operators that do not instinctively want to share ticketing revenue or local authorities and transport operators with different planning horizons and accountabilities. These tensions do not resolve themselves. They require a willingness from all sides to prioritise the passenger experience and, alongside this, there often needs to be frameworks, incentives and formal commitments to give each party confidence. While it can be challenging, where shared vision exists, the results can be transformative.

CASE STUDY

EVERYONE ONBOARD, THE STORY OF PROJECT CORAL

One of the most practical barriers to integrated transport is also one of the most invisible. It's the moment a passenger has to work out what ticket they need to buy, stop and fumble for cash or a different card, and figure out how to pay for the next leg of their journey. Project Coral exists to eliminate that moment. Go-Ahead has been proud to be part of this pioneering project, co-ordinated and delivered by West Midlands Combined Authority, in collaboration with other operators.

For decades, multi-operator ticketing in Britain was held back by a simple but stubborn challenge: different operators use different payment systems. Getting those systems to talk to each other fairly, legally and in a way that works seamlessly for passengers has been genuinely difficult. The result has been a patchwork of local schemes, each solving part of the problem in isolation, with no national framework to bring them together.

Outside London, and more recently, Manchester, a passenger wanting to tap their contactless card and travel across different operators on a single journey has typically been unable to do so. Project Coral is the industry's answer to that.

Project Coral provides a shared legal, financial and technical framework that allows any group of operators or local authorities to offer genuine multi-operator contactless ticketing. A passenger can tap their bank card or phone to board any participating operator's bus, and the system handles everything behind the scenes, allocating revenue fairly, reconciling transactions across operators and ensuring no one is overcharged.

Go-Ahead helped create the conditions that set the scene for Project Coral. As one of the first operators to adopt the contactless payment standards that underpin the scheme, Go-Ahead's early deployments in Oxford and Brighton exposed the gap between what the finance industry standards set out to work, and what happened in reality, once passengers started tapping their cards on real buses. The rejection rates, the edge cases, the moments where the system and the bank didn't agree. Go-Ahead and their technical partners at Ticketer and Littlepay have worked through all of them. In Oxford for instance, the high proportion of international visitors using the airport coach services from Heathrow meant that as many as 13% of declines at some stops were ineligible cards,

a problem that had to be identified in the field before it could be fixed. Go Ahead's advocacy, sustained over the last decade and supported by Ticketer, Littlepay and fellow operators, helped transform Project Coral from an aspiration into a credible, funded programme.

The programme has now completed procurement with a technology partner and is moving into delivery, with West Midlands planning to be the first region to implement Coral at scale. The breadth of support for the scheme already is striking, with 50 local authorities and 10 major bus operators, having signed a letter in support. Beyond the initial rollout, the ambition is genuinely national as Project Coral is designed to work in all areas, no matter what operating framework exists, the particular local geographies, or the operators involved.

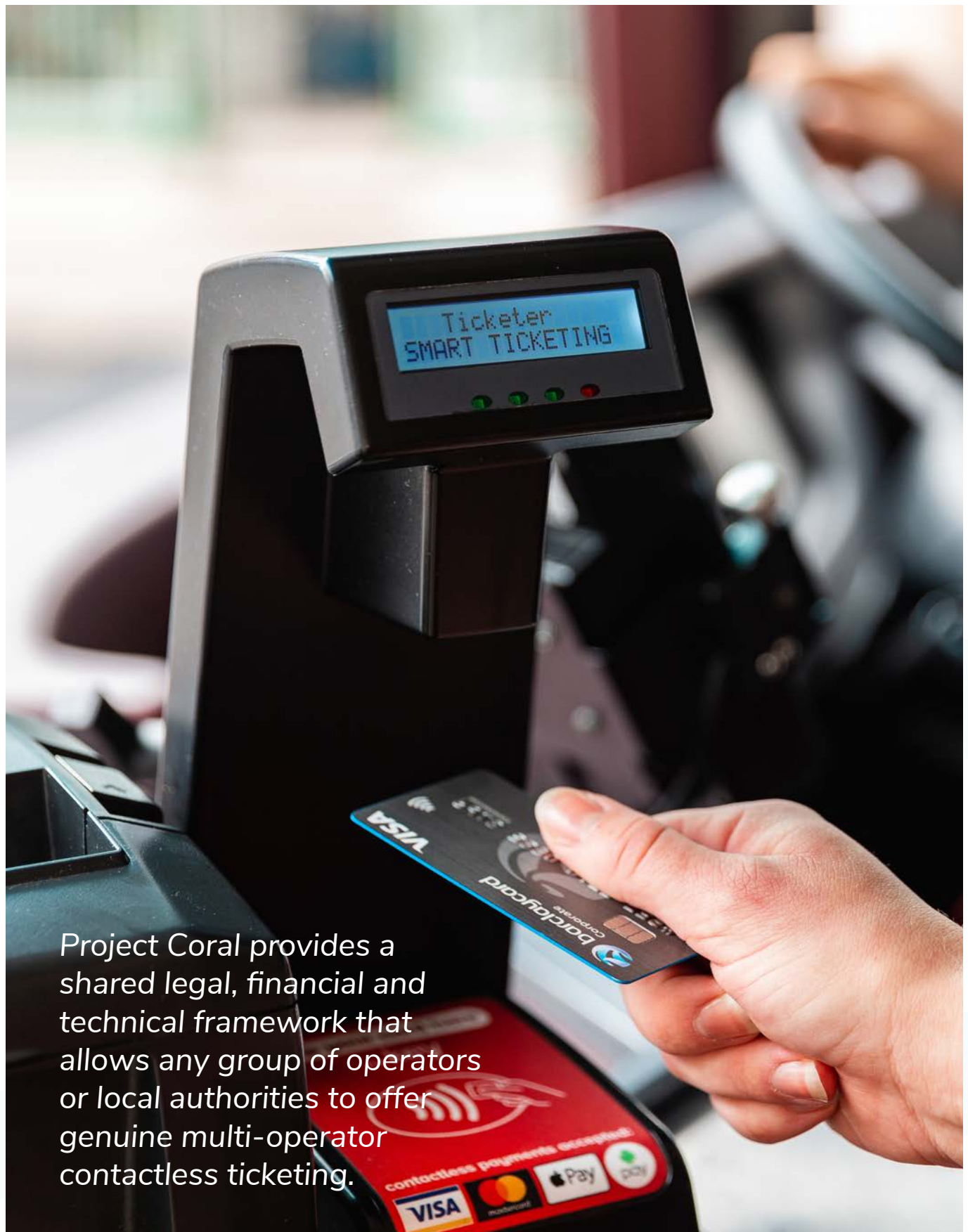
If you'd like to hear more about Project Coral and how you might be able to use it in your area, please contact: projectcoral@wmca.org.uk

Early involvement

When a development is planned without input from a bus operator, the design can make services slow and uneconomical — roads are too narrow, car parking blocks stops and layouts that force buses on lengthy detours. By the time the development is built, retrofitting a decent bus service is often difficult, expensive and sometimes impossible.

The consequences of a lack of early involvement extend beyond inconvenience. A housing development without meaningful transport access could lock residents into car dependency and a business park or employment site that cannot be reached by public transport limits the talent pool available to the businesses within it and excludes workers without cars from the jobs it creates.

On the flip side, the positive case for early involvement is compelling. When operators are part of the conversation from the earliest planning stages, working alongside councils and developers, they bring practical knowledge that can shape design in ways that cost very little at the drawing board stage but would be prohibitively expensive, or impossible, to deliver later. A bus-only link, a correctly positioned stop, a road built wide enough for buses to pass, these are the kinds of interventions that transform the viability of a community's transport connections.



Project Coral provides a shared legal, financial and technical framework that allows any group of operators or local authorities to offer genuine multi-operator contactless ticketing.



What Metrobus has demonstrated is that operators can be genuine architects of integrated communities, when involved early on.

Developers themselves have a commercial interest in getting this right. Good public transport connectivity increases the appeal and value of residential, commercial and mixed-use developments alike.

Currently, the involvement of transport operators, is inconsistent. Whether early involvement happens depends entirely on individual relationships. The result is a postcode lottery, some developments are designed around connectivity from the outset, and others are not, with consequences that last for decades.

CASE STUDY

WHEN BUSES ARE PART OF THE PLAN FROM THE START

West Sussex County Council has understood the importance of operators being involved early for twenty years. The relationship between a supportive county council, a proactive operator and developers who come to the table early has produced some of the best-integrated new communities in the South-East.

The approach Metrobus in the South-East has spent decades investing in, is one where transport is part of the conversation before a single brick is laid.

Kilnwood Vale: the bus first community

Kilnwood Vale is a new neighbourhood on the edge of Crawley. When the concept was first developed around two decades ago, Metrobus was involved from the outset, advocating for the location in part because it sat on existing interurban corridors. The result is a community built around bus priority from the ground up.

At the centre of the area's network is Fastway, a rapid bus transit scheme using a network of guideways and bus lanes to deliver fast, reliable journeys. Metrobus extended the Fastway routes into Kilnwood Vale, meaning residents have access to zero-emission hydrogen buses that take them where they need to go including Crawley town centre and Gatwick. This service runs 24 hours a day, 365 days a year with 16 buses an hour, providing year-round access to local destinations for Kilnwood Vale residents.

Crucially, the bus-only link connecting Kilnwood Vale to its nearest town was conceived at the earliest planning stage, when there was still space in the design to make it happen. The link uses existing infrastructure, with a dedicated roundabout exit, allowing buses to bypass congestion entirely

and deliver fast, reliable journey times that a car travelling the same route simply cannot match. Once built into the design of the development, this kind of infrastructure is permanent and self-reinforcing as the bus becomes the quickest way to travel. It only exists because Metrobus was at the table before the roads were drawn. Had the development been designed without operator input, there would have been no space to add this vital link later and the community would have been worse served.

Woodgate: when developers become believers

Woodgate, a development of around 600 homes just south of Crawley, is a strong example of what early collaboration between an operator and developer can achieve. Metrobus worked with developer Thakeham Homes from the outset, making the case for a 24-hour Fastway connection to Three Bridges station, Crawley Town Centre and Gatwick Airport as a central part of the development's offer to future residents.

The collaboration that followed was thorough. Metrobus worked hand in glove with Thakeham Homes on road design, ensuring streets were built wide enough for buses, stops were correctly positioned and yellow lines placed to give buses priority.

The outcome was a development that sailed through planning, in part because Metrobus wrote a strong letter of support. The developer is now in discussion about further developments, planning bus-only roads and bus priority measures as part of the package, having been won over to the idea that good bus connections help sell houses.

By maintaining strong relationships with county councils, district authorities, developers and Gatwick Airport, Metrobus is able to bring different parties together and design transport solutions that no single organisation working in isolation would reach.

What Metrobus has demonstrated is that operators, working in close partnership with councils and developers, can be genuine architects of well-connected communities. None of this happens in isolation, the best outcomes in West Sussex have come from all parties working together around a common goal. Where that partnership exists, communities get public transport that genuinely services them.

Unlocking growth

The ability of businesses to reach customers, of workers to reach jobs and of visitors to reach destinations, shapes the economic potential of every town, city and region in the country. Transport is the infrastructure that makes those connections possible and integrated transport helps make them seamless.

The case for integrated transport as a driver of economic growth is not simply that it moves more people more efficiently but that it expands the range of what is economically possible. For instance, a business that can draw from a larger labour pool is more likely to find the talent it needs to grow and a visitor who can move freely between destinations spends more and reaches further. In each case, the removal of the friction between modes, operators and geographies, is what unlocks that potential.

The UK's growth challenge is in some ways a connectivity challenge. Productivity is unevenly distributed across the country and the gaps between high-performing and lower-performing regional economies are stubbornly persistent. Building an integrated transport network is one of the most effective tools for addressing those gaps.

Regional productivity

The ability of businesses to access talent, and of workers to access jobs, depends on the transport network connecting them being good enough to make those journeys reliable, affordable and practical. Where it is, economies grow. Where it isn't, potential goes unrealised, firms struggle to recruit beyond their immediate area, workers are locked out of opportunities beyond their immediate geography, and the productivity gains that come from bringing skilled people and high-value employers together do not materialise.

The UK's most productive economic clusters, in science, technology, financial services and advanced manufacturing, are not evenly distributed across the country and the workers who contribute to them do not all live on their doorstep. Connecting people to those clusters, reliably and affordably, is one of the best ways to increase national productivity.

Unlike many of the levers available to government, creating an integrated network does not require years of planning or billions in capital investment to begin delivering results. It requires operators, local authorities and rail partners to work together around a shared ambition, supported by the right policy framework.

CASE STUDY

UNLOCKING THE SCIENCE VALE'S ECONOMIC POTENTIAL

Didcot Parkway sits at the heart of one of the country's most significant economic corridors, the Science Vale. The Science Vale is home to some of the UK's most strategically important research and innovation sites, places where high-value, high-GVA work gets done. Things like developing vaccines and advancing materials science, all driving the kind of innovation that keeps the UK competitive in a global economy. Despite its important role, for years the transport available was holding the Vale back from its full potential.

Didcot Parkway is a well-served mainline station with fast connections to London, Oxford and Bristol. Two important sites, Harwell Campus and Milton Park, sit some distance beyond the station and not within walking distance. For the over 16,000 scientists, researchers and support staff who work there, the gap between stepping off the train and arriving at their desk was bridged by a selection of poorly signposted bus services that few passengers were aware of and fewer trusted. Private shuttle buses were operated by the sites themselves, duplicating the local bus offering with no inter-availability of ticketing. The result was that most people drove. This put pressure on the road network and limited the talent pool available.



Integration done well creates a virtuous cycle that serves the local economy and the local community simultaneously.

Oxford Bus Company tackled the problem from multiple angles, working in partnership with GWR, Harwell Campus, Milton Park and Oxfordshire County Council. The first step was visibility. Using Great Western Railway's Community and Customer Investment Fund, real-time departure screens were installed inside the station, improved wayfinding directed passengers to buses, and information boards were placed outside the entrance so arriving passengers knew exactly where to go before they left the building.

Visibility was followed by legitimacy. Bus shelters outside the station and the buses themselves were wrapped in Milton Park and Harwell Campus branding, giving the service the feel of an official campus shuttle rather than a generic local bus. Interestingly, both sites were particularly invested in this project because their location within an enterprise zone, and the high growth of both sites, means they have planning arrangements that require them to increase the share of people using the bus. This incentive is compelling, and a model the government should consider replicating elsewhere.

As a result of the changes, bus boardings at Didcot Parkway reached 367,000 in 2025. With the station recording approximately 2.9 million entries and exits annually, bus now accounts for 25% of total station patronage. For a parkway station, a category of station typically associated with near-total car dominance, that kind of bus patronage share is unheard of.

The benefits extend beyond the business parks themselves. Higher bus patronage on the Science Vale corridors has improved frequencies and extended operating hours for local residents across Didcot, including the creation of evening and Sunday buses in areas that would not otherwise have them.

Didcot demonstrates something important about the relationship between integrated transport and economic growth, that the connection runs in both directions. Good transport helps the Science Vale attract talent and to grow and the inverse is true too – the Science Vale's growth enables better transport for everyone. Integration done well creates a virtuous cycle that serves the local economy and the local community simultaneously.

Tourism

Tourism is one of the most powerful arguments for integrated transport. When visitors arrive in an area and find a coordinated network of buses, boats and other services, they spend more and leave with a better experience. When they find nothing connecting them to the places they want to go, they hire a car, or don't go at all.

Similarly, when visitors can travel freely between attractions, towns and villages, they reach parts of the country that they wouldn't otherwise and help grow those local economies. When there isn't a

network that enables onward exploration, they cluster around the most accessible destinations, often large cities, and the economic benefit of their visit becomes concentrated in those areas too.

Go-Ahead's network supported £125 million in visitor spending in 2025, enabling a total contribution to UK GDP of £110 million and supporting 1,900 jobs. That impact was not confined to obvious destinations but instead spread across the local economies of every community served by the routes visitors used.

CASE STUDY

RIDE, SAIL, STEAM: SUSTAINABLE TOURISM ON THE SOUTH COAST

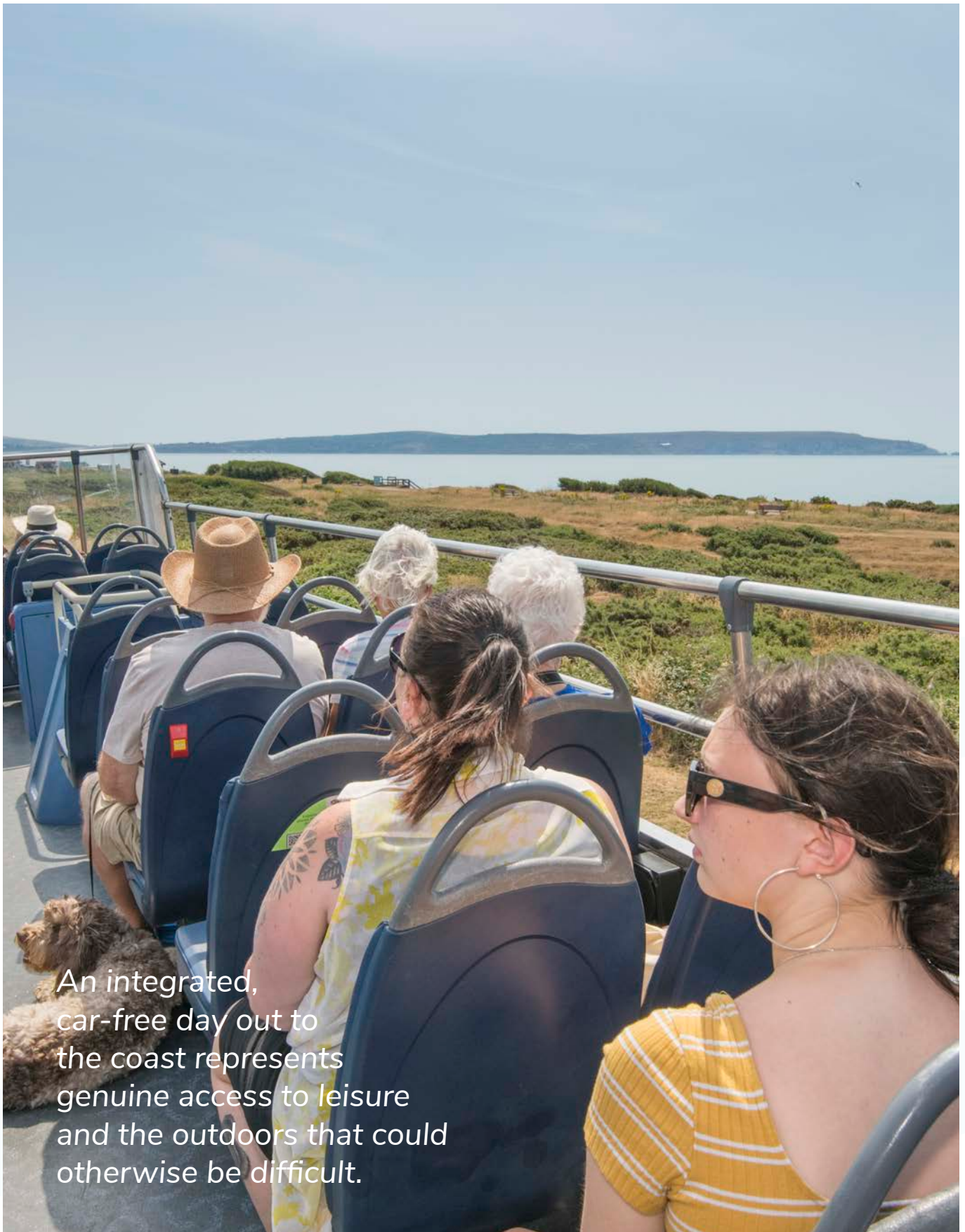
Go South Coast has built one of the most genuinely multimodal tourism networks in England, centred on Routes 40 and 50, the Sandbanks ferry and the Swanage Heritage Railway. Together, they create a day out that is not just car-free but actively better without one.

A visitor arriving at Bournemouth by train can step directly into the interchange and board an open-top bus, an experience in itself along the coast to Sandbanks. At Sandbanks, the bus boards the chain ferry across Poole Harbour, continuing on the other side to Swanage, where it meets the Swanage Heritage Railway at one end of its line. Passengers can ride the steam railway through the Purbeck countryside to Corfe Castle and Norden, where Route 40 meets the other end, completing a loop that can bring visitors back to Bournemouth or help them travel onward to explore more of Dorset. The network is timetabled to make connections practical, meaning passengers arrive at the Heritage Railway with time to look around rather than racing for the next connection. Routes 40 and 50 together carried over one million passenger journeys in 2025.

Of those, around 540,000 were made on concessionary passes, reflecting the routes' particular value to older and disabled passengers for who an integrated, car-free day out to the coast represents genuine access to leisure and the outdoors that could otherwise be difficult.

The integrated network also extends across the Isle of Wight, where Southern Vectis, Go South Coast's island operator, connects with all passenger ferry services running to the island, ensuring visitors and residents alike can travel from the mainland and access any part of the island by public transport.





An integrated, car-free day out to the coast represents genuine access to leisure and the outdoors that could otherwise be difficult.



Bourton-on-the-Water shows what is possible when rural buses are brought into the picture.

CASE STUDY:

THE ROLE OF BUSES IN SUPPORTING TOURISM GROWTH IN RURAL AREAS

Bourton-on-the-Water is one of the Cotswolds' most visited villages, a place of honey-stone bridges, low-arching willows and streams that draw visitors from across the country and beyond. It also has limited parking, narrow lanes and a tourism economy that depends on people being able to get there. For decades, that presented a quiet but persistent problem. Most visitors arrived by car, because public transport was too infrequent, too hard to plan around and too disconnected from the rail network to be a realistic choice.

When Oxford Bus Company took over Pulhams Coaches, their Route 801 ran every ninety minutes on Mondays to Saturdays, with a single vehicle providing a roughly two-and-a-half hour frequency on summer Sundays. Using the government's Bus Service Improvement Partnership funding, Oxford Bus Company invested in transforming the service. Frequencies were increased to hourly, Sunday services were extended to run year-round, evening journeys were added and the route was also extended to serve Chipping Norton.

Alongside this, to make the customer experience as good as possible, the services were re-timetabled to dovetail with both rail and coach arrivals, ensuring that visitors can step right onto a Pulhams bus without a wait. Since the investment in Route 801, passenger numbers have grown by over 60%.

Route 801 is the spine around which Oxford Bus Company is building a wider Cotswolds tourism network by connecting more places and increasing the frequency of services. The ambition is a network that enables visitors using public transport to visit multiple attractions in a day and spend money across the local economy.

Bourton-on-the-Water shows what is possible when rural buses are brought into the picture.

Opening up opportunity

While economic growth matters, growth that leaves people behind, that concentrates opportunity in certain places and communities, is not the kind of growth that builds a fair or resilient society. The true measure of an integrated transport network is not just whether it supports GDP or enables tourism, but whether it enables access to opportunities for the people who need it most.

Integrated transport is one of the most direct tools available for reducing the gap between those who can access opportunity and those who cannot. It connects people to jobs they could not otherwise reach, to education that would otherwise be out of range, to healthcare they might otherwise go without and to social connections that keep them going.

The communities that benefit most are often those that are hardest to serve like those rural areas where distances are long and coastal towns where geography creates natural barriers. In these places, integrated transport makes journeys possible.

Connecting people to work

Access to work is one of the most fundamental things an integrated transport network can deliver, and one of the areas where its absence is felt most acutely. When public transport does not connect people to where jobs are, there is greater unemployment and welfare dependency. At the same time, businesses cannot find the staff they need. This creates communities where aspiration is constrained not by a lack of ambition but by a lack of access.

The relationship between transport and employment is not just distance, it is about ensuring a reliable and frequent service that works for commuters. Getting people to work means designing a network of services around the reality of how, and when, work happens.



CASE STUDY

WORKING AROUND THE CLOCK

Gatwick Airport is one of the UK's largest employers, supporting tens of thousands of jobs across the airport itself. Right on its doorstep sits the Manor Royal Business District, one of the largest business parks in the South East, employing around 20,000 people. Shift patterns at the airport and nearby warehouses mean workers may need to arrive at work at 3am or finish well after the last train. Metrobus, part of Go-Ahead's Brighton & Hove operation, is expanding its operation around that reality.

For those relying on public transport, even one inaccessible shift a month can be enough to force a worker to get a car or turn down a job entirely. A worker who finds that public transport cannot reliably cover one shift in four will often feel the necessity to run a car and never use the public transport available. The result is not just one lost bus journey but a permanent modal shift back to the car, and a worker who will never be won back.

The consequence is environmental as well as personal. Every worker who concludes that public transport cannot be relied upon adds another car to already congested roads around one of the UK's busiest transport hubs, contributing to emissions and air quality problems that affect the whole region.

Following a staff travel survey that identified public transport access as a real issue for the workforce living in East Grinstead, Gatwick and Metrobus sprang into action to find a solution. Using the survey data to understand where else workers lived that could be serviced by the same route, and where investment in additional services would have the greatest impact, they began designing a new bus route, the 500.

Critically, the bus was able to respond to the worker's needs at a pace that other modes simply cannot do. While expanding rail infrastructure requires years of planning, consultation and capital investment, Metrobus was able to design and launch the 500 route at speed. This agility is one of the most underappreciated strengths of well-run bus networks, the ability to identify a need and meet it, fast.

Today, Metrobus operates eight 24-hour routes with services designed so that residents of Crawley and Horley, the two towns where most airport workers live, are within walking distance of a 24-hour bus at all times. Now the communities of East Grinstead, Uckfield, Hailsham and Eastbourne are all connected to a 24 hour bus which takes them to one of the UK's largest airports and nearby business park. Just a few short weeks after the service launched, around 8,500 people are using it each week to get to where they need to go. That's up 20% since the route was launched and is expected to continue to grow as awareness spreads.

The impact of this is measurable. In 1997, just 5% of airport workers living in Crawley travelled to work by bus. Today that figure stands at nearly 37%, a transformation driven by two decades of sustained investment in frequency, reliability and round-the-clock coverage. That shift represents thousands of workers who have been able to take up or retain employment at Gatwick without needing to own or run a car, reducing congestion, cutting emissions and opening up jobs to people who would otherwise have been locked out of them.



In 1997, just 5% of airport workers living in Crawley travelled to work by bus. Today that figure stands at nearly 37%.



Go South Coast makes this a reality through a carefully integrated chain of connections that link the island to the mainland and onward to the wider national rail network.

CASE STUDY

A COMMUTE OVER THE WATER

The Isle of Wight has a resident population of around 140,000 people and, as an island, a limited, and often seasonal, local job market. For many residents, employment particularly in professional, public service roles, requires travelling to Southampton or beyond.

Go South Coast makes this a reality through a carefully integrated chain of connections that link the island to the mainland and onward to the wider national rail network.

A journey begins aboard a Southern Vectis bus service, operating every 10 minutes, on the Isle of Wight, which connects via a short walking route with Red Jet's fast ferry service at the terminal. The Red Jet crossing takes around 25 minutes to Southampton, where a Go South Coast bus in partnership with Red Funnel Ferry 'Quay Connect', is designed specifically to meet Red Jet arrivals, is waiting at the terminal. The bus connects passengers directly to the city centre, other bus services and then Southampton Central Station, with onward connections across the national rail network. Over 210,000 people use this one bus service every year.

Crucially, the ferry connection bus is included free within the Red Jet ferry ticket, as part of its commitment to make sustainable travel the default for its passengers, and one that Go South Coast supports as the operating partner.

The connection serves a genuine commuter market. Isle of Wight residents regularly use the chain for work trips to Southampton, taking advantage of the Red Jet's speed to make a journey that would otherwise require a car and a much longer crossing by vehicle ferry.

For an island community with a constrained local economy, the ability to access Southampton's employment opportunities reliably and without a car is not a marginal benefit. It is the difference between the island being a viable place to live for many of its working-age residents and one where employment opportunities are structurally limited by geography.

Social inclusion

Social inclusion is rarely the first thing that comes to mind when people talk about integrated transport but for many of the people who depend on public transport most, it is crucial. For older people, those with disabilities, people on low incomes and residents of the most isolated communities, a bus that doesn't run, a connection that doesn't work or a journey that is too complicated can be the difference between inclusion and isolation.

The consequences of poor networks reach far beyond missed journeys. While people who cannot access healthcare miss appointments and people who cannot reach education miss opportunities those who are cut off from social contact experience loneliness that has a real physical and mental toll.

As well as the impact on the individual, social isolation has measurable costs to wider society, to the NHS, to local economies and to public finances. A transport network that keeps people connected to healthcare and their community reduces those costs.

A network of separate, uncoordinated services may nominally cover a geography but if the timetables don't connect, the tickets don't transfer and the information doesn't exist to plan a multi-leg journey, that coverage is theoretical rather than real. Integrated transport removes the barriers that sit between someone without a car and the places they need to reach.



CASE STUDY

NO ONE LEFT BEHIND: TACKLING SOCIAL ISOLATION IN SOME OF THE UK'S MOST REMOTE COMMUNITIES

Cornwall is one of England's most geographically isolated counties. Stretching across a peninsula largely beyond the reach of the national motorway network, the county is 92% rural with a dispersed population spread across villages, coastal communities and small market towns, the risk of social isolation is real and significant. In particular, the Rame Peninsula is geographically one of the most isolated communities in England, surrounded on three sides by water, the English Channel, Plymouth Sound and the River Tamar with the only road connection to Plymouth, the nearest city, requiring a lengthy detour inland.

For those without a car, dependency on public transport is acute. On the Rame Peninsula, where villages are home to working communities with limited local employment, the connection to Plymouth is not optional, it is the difference between being able to work, study and access services, and not.

Go South West operates a bus service that boards the Torpoint vehicle ferry from Plymouth, crosses the Tamar and continues directly along the peninsula.

Around 200,000 passengers a year travel across the Rame Peninsula on these services, with many making the full seamless journey into Plymouth by ferry without needing a car.

At the southern tip of the peninsula, the Cremyll foot passenger ferry provides a second link into Plymouth every 30 minutes, with a crossing time of just eight minutes. Here, Go South West coordinates its timetable directly with the ferry, helping to make the journey as smooth as possible for its customers.

For residents of one of Cornwall's most geographically isolated communities, these connections provide access to jobs, healthcare and services that would otherwise be out of reach without a car. The integration of bus and ferry into a single coordinated network means that geography is no longer a barrier to opportunity, and that the Rame Peninsula, despite sitting at the very edge of the county, remains genuinely connected to the rest of it.

The customer experience

All of the planning to create an integrated network ultimately comes down to a single moment, a passenger standing at a stop, boarding a bus, making a journey. The customer experience is where integration is tested. The network could be well-designed on paper and poorly experienced in practice when a ticket doesn't work, the connection that should be obvious isn't signposted or when the service that should be reliable turns up late or not at all. Conversely, a network that genuinely works for passengers, where any ticket gets you on any bus, where the information you need is available before you need it and where disruption is communicated quickly, builds trust.

When it comes to public transport, it's trust that turns occasional users into habitual ones. That trust, once built, is enormously valuable because passengers who have a good experience on public transport use it more. Convenience is one of the most powerful levers available for growing patronage.

Resilient and reliable networks

All the benefits of integrated transport from seamless journeys to easy ticketing and accessible information depend on one thing above all else, the services have to show up on time. A beautifully designed interchange, a shared ticketing product and a real-time information screen are worthless if the bus does not actually arrive. Reliability is the foundation on which a good public transport systems sits.

Reliability matters more in an integrated network than in a fragmented one because when journeys depend on connections, a single failure can cascade to ruin the entire journey. A bus that runs ten minutes late does not just inconvenience its passengers, it breaks the connection to the train, which breaks the onward journey, which could leave a passenger stranded for longer and further from, where they need to be. The tighter the integration, the greater is the dependency on each component performing as planned.

The ability of a network to absorb disruption and keep people moving is therefore integral to integration. A resilient integrated network has redundancy built in from alternative routes when services fail, clear communication when disruption occurs and the kind of frequency that means a missed connection is an inconvenience rather than a crisis. It also has the infrastructure to support reliability like bus priority measures that protect journey times from traffic congestion, real-time monitoring that identifies problems before they compound and strong working relationships between operators so that disruption on one mode can be communicated to passengers on another.

Delivering reliability consistently requires investment in vehicles, in infrastructure and in people. Go-Ahead invested over £640 million in its UK network in 2025 alone, with new buses, updated timetables and improved facilities designed to raise service levels across the country. Yet investment in operators' own networks is only part of the picture; congestion, road closures and infrastructure failures all affect bus performance in ways that operators cannot control. Delivering the reliable, resilient network that passengers need and deserve requires the same shared commitment between operators, local authorities and government that underpins integration more broadly because a network that works for passengers is one that every party has taken responsibility for making work.

CASE STUDY

SMARTER OPERATIONS CONTROL AT GO-AHEAD LONDON

As one of the capital's largest bus operators, Go-Ahead London runs services where reliability is everything. Passengers, Transport for London, and local communities all depend on buses arriving when they should. To raise the bar further, Go-Ahead London recently invested in a new best-in-class operations control centre, bringing real-time oversight of its network into a single, modernised hub.

The control centre gives operators a live, joined-up picture of services across the network, allowing them to prevent disruption and respond to situations before issues arise. Rather than reacting to problems after the fact, controllers can intervene proactively, rerouting, regulating service gaps, and keeping passengers moving.

The result is a measurable strengthening of reliability and efficiency. The new control centre combined Go-Ahead London's six operating control centres into one purpose-built facility, which allows for the monitoring and co-ordinating of Go-Ahead London's services 24 hours a day, seven days a week across the entire fleet of over 2,400 buses on 170 routes across London. Since the move, the previous South East London hub that looked after 5 garages has seen improvements of between 2% and 23% where new ways of working have been implemented. Furthermore, introducing an engineer into the OCC has resulted in a 16% improvement in mechanical lost mileage since January 2026.

The initiative reflects a wider principle at the heart of Go-Ahead's approach: that integrated, well-run operations are the foundation of a transport system that genuinely works for passengers. By investing in the tools and infrastructure that make services more dependable day-to-day, north London demonstrates how operators can lead on integration, not just connecting modes and ticketing, but joining up the operational intelligence that keeps the whole network running smoothly.

Easier ticketing

The main thing that passengers want from public transport is simplicity, a ticket that works, a transaction that takes seconds and confidence that whatever bus or train arrives, they can board it without fumbling for a different ticket or the right change.

That simplicity is harder to deliver than it sounds. Historically, a passenger travelling across two operators in a single journey may need two separate tickets, two separate apps, two separate transactions. The friction this creates is not just inconvenient, it can be a genuine deterrent.

The good news is that the problem is solvable, with operators willing to collaborate and a shared commitment to making the passenger experience the priority. There is strong reason to do so. As the evidence from the places that have simple, integrated ticketing suggests, when ticketing is simplified, patronage grows.

The benefits go beyond convenience. Contactless tap-on tap-off technology does something that a pre-purchased ticket cannot, it automatically calculates the best fare for the journeys made and applies a daily cap, so that a frequent traveller never overpays. In Brighton, in the early weeks of Go-Ahead's contactless rollout, around 15% of all journeys benefited from fare capping, meaning a significant proportion of passengers were actively saving money, without having to do anything other than tap their card.



It's trust that turns occasional users into habitual ones.



The North East's integrated ticketing system is one of the most developed in England outside of London.

CASE STUDY

HOW THE NORTH-EAST BUILT BRITAIN'S MOST INTEGRATED TICKETING SYSTEM

For most people in the North East, switching between the bus, Metro, ferry and even some rail services, does not require a second thought. One ticket can cover the entire journey, regardless of the mode of transport or who manages it. Thirty years after deregulation fragmented public transport across much of England, the North-East remains one of the few places where passengers can still travel across multiple modes as though they are using a single network.

Integrated ticketing in the North-East predates most of the policy frameworks now being discussed nationally. From the moment deregulation took effect, operators recognised that the Tyne and Wear Metro needed to work alongside buses rather than in competition with them. The result was a suite of multi-modal tickets, marketed under the Network One brand, that allow passengers to travel across all bus services, the Metro, the Shields Ferry and certain rail services on a single ticket. For frequent travellers crossing multiple operators and modes, Network One season tickets have been the default for decades.

To manage the scheme fairly across competing operators, a separate company, Network Ticketing Limited, divides fares through an independently audited system that determines each operator's market share, ensuring that collaboration on ticketing does not compromise commercial fairness.

When the Bus Service Improvement Partnership (BSIP) launched in 2022, it gave the North-East the opportunity to go further. Working with the Metro Mayor and wider North-East Combined Authority, Go North East helped design a new generation of integrated ticketing products aimed at specific customer groups.

These recent initiatives have deliberately focused on widening access, for instance, the creation of a new under-22 £1 single and £3 day ticket offer. Discounted multi-operator tickets for adults and young people have reduced the cost of travelling across the region, while the Kids Go Free programme enabled more than 226,000 journeys in a single year.

Together, these measures demonstrate how integrated ticketing can do more than just simplify travel, it can help connect people to education, employment, leisure and opportunity who might otherwise be priced out of public transport.

The North East's integrated ticketing system is one of the most developed in England outside of London, and the numbers demonstrate the scale of impact. It is estimated that nearly 14 million people used Network One products across the North-East last year (2025) alone. This is the result of thirty years of deliberate collaboration between operators, transport authorities and, more recently, a directly elected Mayor prepared to use the levers available to make public transport genuinely affordable. The result is a network where switching between bus, Metro and ferry is frictionless, where the price of a day's travel across a major city region is within reach for families and young people, and where the case for leaving the car at home is not just practicality but affordability too.

Access to information

A ticket that works is only half the battle. The other is knowing what journey to make in the first place. For many passengers, particularly those travelling somewhere unfamiliar, those who use public transport infrequently, or those trying to navigate a multi-leg journey across operators and modes, the barrier is often the information, or lack of it.

A passenger planning a journey from a village to a city via bus and rail needs to know which bus connects with which train, what the walk between them looks like and whether the connection gives enough time. Finding an easy to access, reliable answer to that type of query has, historically, been challenging.

Networks that run seamlessly but cannot be understood by passengers are underused. Simple changes like real-time departure screens inside train stations, bus maps that show where train stations are and announcements on buses that tell passengers which interchanges are coming up, all help make a network easy to understand.

CASE STUDY

JOURNEY PLANNING MADE EASY: THE ROLE OF TRAVELINE

Integrated transport is only as good as a passenger's ability to navigate it. A network of buses, trains, coaches and ferries that you can't understand easily enough to use, is barely a network at all. Traveline exists to solve that problem.

Before Traveline, finding out how to make a journey by public transport across different operators or modes was genuinely difficult. You might know your local bus timetable, but if you were somewhere unfamiliar, the only option was to find a bus station, track down a local operator or simply guess. For people wanting to plan a trip that used rail, bus and coach, the information just didn't exist in one place, making it almost impossible to navigate.

The Transport Act 2000 recognised this as a fundamental barrier to public transport use and established a single, impartial source of public transport information - Traveline. Go-Ahead sits on the Traveline board, playing an active role in ensuring the organisation remains well-governed, financially sustainable and true to its mission.

At its core, Traveline is simple: one phone number, one journey planner, one source of truth. A passenger can plan any journey by public transport and receive accurate, up-to-date information for the full journey, from a city centre hop to a multi-leg trip involving a rural bus, a ferry crossing and a train. Today, Traveline's website attracts 800,000 visitors every month and that figure understates the true reach of the service as Traveline's journey planner API, which powers third-party apps and platforms across the country, was accessed over 118,000 million times in 2025 alone.

The service has evolved considerably since its launch. What began as a telephone call centre in 2000, with a text service following shortly after for basic next-bus information, has grown into a full digital platform with real-time journey planning. The shift in how passengers access information has been dramatic since 2015, text usage has fallen by 91% and telephone calls by 92%, while the mobile web service has grown by over 500%. Crucially, the original channels have never been abandoned, the text service still works, there are stickers on bus stops that still return live bus times and the call centre remains operational, almost 24/7. For passengers without smartphones or in areas with poor connectivity, those older channels remain genuinely important and Traveline's commitment to maintaining them reflects an understanding that digital inclusion matters as much as digital innovation.

Traveline is used across the country but its value is greatest where the alternatives are weakest. In rural areas in particular, where a journey might require a bus, a ferry and a train and where local knowledge cannot be assumed, Traveline's ability to surface the full picture is invaluable — and irreplaceable.

The net zero case

Integrated transport is one of the most powerful ways we can reduce emissions. The climate case for public transport is often made in terms of fleet decarbonisation, with zero-emission buses replacing diesel. That matters and Go-Ahead is investing significantly in zero-emission buses across the network. However, fleet decarbonisation only reduces the emissions of journeys already being made by bus. The bigger prize is making public transport good enough that it becomes a genuine first choice for more journeys, and that depends entirely on whether the integrated network is good enough to make it a practical one.

Road transport is responsible for around a quarter of the UK's total greenhouse gas emissions with cars accounting for the majority of that. The environmental case for modal shift goes beyond carbon alone. Congestion has a direct effect on air quality, with significant consequences for public health, particularly for children, older people and those with respiratory conditions who live and work closest to the busiest roads. Moving people from cars to buses directly reduces congestion, creating cleaner, healthier spaces for communities.

The more integrated public transport is, the more people use it. The more people use it, the fewer cars are on the road. That is the modal shift dividend, and it is one of the most powerful contributions integrated transport can make to net zero.



The more integrated public transport is, the more people use it. The more people use it, the fewer cars are on the road. That is the modal shift dividend.

CASE STUDY

HOW INTEGRATED TRANSPORT IS CHANGING THE WAY PEOPLE VISIT CORNWALL

Cornwall receives around three to four million visitors above its resident population every year and the vast majority arrive by car. The roads that serve this beautiful but geographically constrained peninsula are not built for that volume of traffic, particularly in summer when the bulk of tourists flock to the area.

One example of Go South West's work to make tourism here more sustainable is the Eden Project. As one of Britain's most visited attractions, the Eden Project draws hundreds of thousands of visitors each year to its extraordinary biodomes.

Working with GWR, Go Cornwall Bus strengthened the bus-rail connection to the Eden Project by increasing peak season frequency, with buses running every twenty minutes, and timed to connect with train arrivals. At the same time, they worked together on a joint marketing campaign reaching as far as London Paddington, promoting the car-free journey as a positive choice rather than a fallback.

While the Eden Project is a compelling case study, the argument it illustrates runs across the entire Cornish tourism network.

Cornwall's geography means that every visitor shifted from car to public transport has a meaningful impact, reducing the strain on narrow roads, limited parking and the cumulative effect of millions of car journeys through the county every summer.

This is felt in congestion, air quality and carbon emissions in communities that have little alternative infrastructure to absorb it. That congestion itself undermines public transport performance, with public transport providers needing to invest in additional resource simply to maintain punctuality on routes where tourist traffic would otherwise erode reliability.

Go Cornwall Bus operates a network specifically designed to make car-free tourism viable, with bus services running along coastal routes and to destinations that trains cannot reach directly, often timed to connect with GWR arrivals at key stations. Integrated ticketing through PlusBus and Ride Cornwall means thousands of people can plan and purchase a car-free journey from anywhere in the country, with the bus leg already included in their ticket.

The Eden Project partnership shows what is possible when an operator, a rail partner and a major attraction share the same ambition and work toward a common goal. When those elements come together, they create the conditions for visitors to make different choices, not by removing options but by making the public transport alternative realistic.

CASE STUDY**HOW OXFORD MADE NET ZERO WORK IN PRACTICE**

Decarbonising bus networks is not simply a matter of buying electric vehicles. A new electric bus sitting in traffic for the same time as the diesel one it replaced produces fewer emissions, but not none. It also costs more to operate than it needs to and does little to shift passengers away from their cars. Oxford recognised this reality early and built a model that made the economics work by tackling congestion first.

This all started back in 2019 when the government signalled that significant funding was available to make Oxford the country's first all-electric bus city. The ambition was clear and the money was there, but Oxford Bus Company looked at what was being proposed and concluded it was not yet viable. Congestion in the city was too severe and bus running speeds too slow for the business case for a large fleet of expensive electric vehicles to stack up.

Rather than accept funding for an undeliverable promise, as another county did, and has since struggled to honour, Oxford Bus Company said it would shape a more realistic but genuinely ambitious scheme. They told the council they needed to see a 10% improvement in bus running speeds before the investment in electric vehicles could be justified.

The council proposed three interventions: a traffic filter scheme restricting private car access on key routes at peak times; a workplace parking levy; and a zero-emission zone. The traffic filter scheme was approved by the council's cabinet in 2022, before the vehicles were even ordered, giving Oxford Bus Company the confidence it needed.

With the traffic filter scheme agreed and a commitment to improve bus running speeds by 10%, the investment case was made.

The Go-Ahead Group committed approximately £31 million of its own capital alongside securing £26 million from the government's ZEBRA scheme and a further £4 million from the council's climate emergency fund. 104 zero-emission vehicles were purchased along with all the supporting charging infrastructure, including the complete electrification of Oxford Bus Company's Cowley depot, with over 100 high-powered charging stations.

With some challenges preventing immediate introduction of the traffic filter scheme, a congestion charge scheme was introduced in October 2025 and since then Oxford Bus Company has seen 10% patronage growth on its bus services across Oxfordshire. As a result, the 2025/26 year was the first in which Oxfordshire reached pre-COVID patronage levels and it is already on track to exceed them in 2026/27.

Oxford now has the highest number of zero-emission buses per capita of any city in the UK outside of London, with a further 13 electric buses hitting the road so far in 2026 bringing the total to 117 vehicles. The fleet is running, the depot is electrified and the council remains committed to reducing congestion.

Oxford's approach contains an important message for national policy. Decarbonising buses requires more than vehicle funding. It requires the road conditions in which electric buses can operate productively in order to use electrification as the trigger to creating a virtuous circle driving further investment.

A roadmap for the future

The evidence in this report is clear, integrated transport works. Where operators, authorities and government have aligned around a shared ambition, the results are tangible. Patronage grows, car dependency falls and communities are better connected – to work, to each other, and to opportunity.

It is important to be honest that integration is a journey, not a destination. The examples in this report represent some of the best of what has been achieved through sustained partnership working. However, there are still communities, particularly in rural and coastal areas, where the benefits of integration have yet to arrive. Acknowledging that is not a weakness in the case for integration, but it should serve as a reminder about why this matters so much and why delivering the right frameworks to support it, is so important.

The challenge now is not demonstrating that integration is possible, but making it the norm rather than the exception. Four changes, taken forward as a shared endeavour between operators, councils and the government would catalyse integrated transport across in the UK:

1. Bring transport providers, councils and developers together from the start

Every significant new development creates travel patterns that will endure for decades. From the roads that are built to support a new development to the distances between it and other frequently visited destinations. These decisions shape whether future residents will have genuine travel choices or find themselves reliant on car by default. Getting them right requires transport providers, local councils and developers to work together from the very start rather than as an afterthought when plans have already been drawn up.

At present, operators have no guaranteed role in that process, with involvement depending on the appetite of individual planning authorities and developers.

Yet operators have so much knowledge to share that can make a difference that tangibly improves the development itself, and as a consequence, people's lives. The consequence of not involving operators is that too often new communities have car dependency built in.

The solution is straightforward, major developments should be shaped through genuine collaboration between councils, developers and transport providers from the earliest planning stages. Transport connectivity should be treated as a core design requirement, with bus operator input on route viability, interchange locations, and development densities and layout all shaping decisions from the outset.

2. Harness Project Coral's ticketing system

Passengers do not think in operators, they think in journeys. A system that requires them to carry separate tickets or consult multiple apps, is working against itself by making public transport harder to use, and making a car journey look simpler in comparison.

Project Coral is the industry's answer to that problem. A single, seamless contactless payment platform that works across operators, automatically applying the best available fare and capping daily spend regardless of how many services a passenger uses.

It's common sense, that's why it had the support of every major bus operator.

What is needed now is the active engagement of local and devolved authorities to deploy it in their area.

The evidence for doing so is compelling. As can be seen earlier in this report, in Brighton, Go Ahead's rollout of tap-on tap-off technology saw 15% of journeys benefit from automatic fare capping, meaning a significant number of regular passengers were saving money every day without having to do anything other than tap their card. Scaling that nationally would change the economics of bus travel for millions of people.

3. Provide the road conditions that make public transport a success

A bus is only as good as the road conditions it operates in. Where buses can run reliably and on time, they become a genuinely attractive choice, and patronage follows. Bus priority infrastructure, including dedicated lanes and traffic signal priority, has a direct and measurable impact on journey times and reliability, which in turn shapes whether passengers trust public transport enough to choose it regularly.

Creating better travel choices for everyone means that highway decisions should reflect how different modes perform and how many people they can move.

Local authorities and government at every level play a critical role in creating the road conditions that allow public transport to deliver on its potential.

Bus Service Improvement Partnerships already provide a framework for local authorities and operators to commit together to improving road conditions for public transport. These commitments represent genuine shared investment in better connectivity, and where they are made, both operators and government should support their delivery. Where commitments go undelivered, government should hold local authorities to account.

4. Bring coaches into the integrated transport framework

Coaches carry millions of passengers every year, connecting cities, towns and rural communities on routes that often the rail network cannot reach. For many places, particularly smaller towns and rural areas without a rail connection, coaches represent the only long-distance public transport link available. They are also often a more affordable mode of travel, which open up long-distance travel, for more people.

Yet coaches sit almost entirely outside the integrated transport conversation. Their stops are often separate from local transport hubs. They often do not feature in multi-modal journey planners as a matter of course. Passengers often find they cannot build a seamless itinerary that combines a coach leg of a journey

with rail and bus. The result is that a mode carrying millions of people a year, operates as a parallel network that rarely connects to anything around it.

The steps required to change this are simple. They include; standard requirements for coaches to use bus stations and transport interchange facilities to establish the physical connections, making sure coach services are included in national journey planning systems to make them discoverable to people who would otherwise not have considered them as an option and bringing coaches into the ticketing frameworks that exist, or are being built, for other modes to close a gap that has been limiting the reach of integration for too long.

The opportunity is clear

Britain has what is needed to build a genuinely integrated transport network, and this report shows there are multiple cases of integration happening across the UK. What has too often been missing is the consistency of purpose that turns individual examples of good practice into a national standard.

The question now is whether the policy environment will enable it at scale.

The four recommendations above are not radical asks. They are practical steps, grounded in what already works. None would require new institutions or significant political expenditure.

However, they all require something even more important – a consistency of purpose between the operators who run services, the authorities who shape the environment they run in, and the government that sets the framework for both. The strongest examples in this report are not stories of operators delivering in spite of the system, they are stories of councils, operators, rail partners, ferry providers and communities working together around a shared objective. With that same spirit applied more broadly, the progress documented in this report could become the rule rather than the exception. Go-Ahead stands ready to play its part as an operator, an innovator and a willing partner in that shared endeavour.

GoAhead