

Annex 3: Opportunities and Challenges - outline content

This annex summarises the key challenges and opportunities affecting the bus network in Oxfordshire, highlighting pressures from growth, congestion, funding and fragmentation, alongside opportunities for buses to better support connectivity, sustainable development and climate objectives through closer integration with planning and other modes. This content may be refined through further engagement.

Oxfordshire today: a growing county under pressure

Challenges

- Rapid housing and economic growth (not necessarily aligned spatially)
- Up to 250% bus growth required to meet LTCP 2040 targets
- Interurban congestion impacting reliability and journey times
- Funding constraints and post-pandemic travel shifts
- Adapting to Government policy change and governance complexity (LGR/Devolution)

Opportunities

- Strong history of political support for public transport
- Buses as a scalable, flexible solution
- EP+ enabling joint network planning with operators, shaping services around demand
- Devolution enabling strategic, joined-up leadership across a wider geography

Unlocking sustainable growth through development

Challenges

- Risk of car-dependent developments: bus provision too late / not prioritised
- Disconnect between planning and transport functions
- Additional bus depot capacity needed to unlock growth

Opportunities

- Buses enable sustainable growth
- Embedding buses in master planning and place design
- Integrating developments into existing networks to maximise efficiency and reduce reliance on new services

Connecting Oxfordshire (local to international)

Challenges

- Inconsistent first/last mile connectivity to other transport modes
- Rurality and low density affecting viability of servicing by bus

Opportunities

- Buses as key connectors across modes
- Strengthened strategic corridors (inter-urban, P&R, rail feeders)

Supporting visitor and night-time economies

Challenges

- Aligning with shift work, leisure and tourism demand
- Aligning with seasonal travel demand patterns

Opportunities

- Buses (and coaches) supporting tourism and visitor economy

- Improved access to key destinations and heritage sites
- Growth in evening, weekend and seasonal services
- Stronger partnerships with tourist and visitor organisations

Enabling inclusive, accessible and safe travel

Challenges

- Inequalities in access (e.g. rural, non-car, non-digital users)
- Accessibility and safety barriers
- Rising cost pressures risking service decline and isolation if not aligned with revenue growth

Opportunities

- Sustainable travel as default mode
- Targeted interventions (e.g. for young people, women, concessionary users, deprived communities)
- National focus on socially necessary services strengthens the case for protecting essential bus routes

Tackling congestion and improving reliability

Challenges

- Congestion limiting performance and growth
- Significant network disruption expected from major infrastructure and roadworks, with limited resilience due to constrained capacity

Opportunities

- Bus priority, enforcement and demand management
- Improved journey times and reliability
- Increased competitiveness with the car → modal shift
- Step-change interventions already underway (e.g. congestion charging and lane rental)

Delivering a financially sustainable network

Challenges

- Long-term decline in use (pre-COVID)
- Often short-term, fragmented funding
- Reliance on subsidy (Govt / S106)
- County Council financial pressures

Opportunities

- Growing patronage to strengthen revenues
- Consolidated transport funding from Government enabling greater flexibility for integration and joined up decision making
- Leverage more private funding for bus, working with major employers
- Government funding certainty to 2028/29

Accelerating decarbonisation

Challenges

- High costs and infrastructure requirements for zero-emission transition
- Risk of trade-offs with service levels
- Space and grid constraints
- Limitations of current EV technology

Opportunities

- Building on Oxford's EV leadership
- Alignment with net zero 2040 ambition
- Cleaner air and public health benefits

Creating a seamless public transport system

Challenges

- Fragmented customer experience (ticketing, information, interchange)
- Multiple operators and systems
- Slow national programme delivery (e.g. Project Coral - a national technology solution to facilitate multi-operator ticketing on buses)
- Limited data on end-to-end travel patterns across modes

Opportunities

- Further use of the MyBus platform and Tap On Tap Off expansion
- Integrated ticketing and journey planning
- Improved fares, information and coordination
- Rail investment and new stations enabling better first/last mile links