



**TRANSPORT
SCOTLAND**
CÒMHDHAIL ALBA

Scottish Transport Statistics 2025

Bus and Coach Travel

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Introduction

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

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

Bus travel in Scotland was profoundly affected by the Covid-19 pandemic, with restrictions on travel and daily activity in place for large parts of 2020. Comparisons with 2020 and 2021 should therefore be treated with caution.

Key points

- **334 million journeys were made by bus in 2024-25. This is an increase of 2% on 2023-24. Over half of these were made under the National Concessionary Travel Scheme.**
- **There were 2.4 million people with National Concessionary Travel cards in Scotland in 2025.**
- **The bus industry received £392 million in funding for concessionary fare support and £124 million from local or central government in 2024-25. Passenger revenue in 2024-25 stood at £391 million in Scotland.**

Main Points

Vehicles and Passengers

Around 334 million passenger journeys were made by bus in Scotland in 2024-25. This is an increase of 2% on 2023-24 and a 31% fall from a peak in 2007-08. Journeys under the National Concessionary Travel Scheme make up over half of this figure (55%). (*Table 2.2a*)

The distance covered by local bus services (expressed in terms of 'vehicle kilometres') can be seen as a measure of bus service provision. Although this has risen in 2024 by 5%, the number of passengers carried only rose by 2%. (*Table 2.3a*)

The number of buses in operators' fleets decreased by 15% since 2019-20 and there was a 2% decrease in the number of staff employed in the industry over the same period. (*Table 2.1a and 2.4*)

Passenger journeys fell by 7% for Scotland and 10% for Great Britain over the past five years. Vehicle kilometres in both Scotland and Great Britain fell by 12% over the same period. (*Table 2.2a and 2.3a*)

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

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

Bus use is higher in urban areas and lower in rural areas. The Scottish Household Survey travel diary shows 61% of those who used the bus the previous day lived in large urban areas compared to 2% of users living in remote rural areas. (This compares to population estimates of 35% living in large urban areas and 6% living in remote rural areas.) These figures are supported by the results of the more general question on bus use included in the Transport and Travel in Scotland publication which shows 57% of respondents in large urban areas had used the bus in the last month compared to 17% of those in remote rural areas. (*Table 2.10*)

Operator revenue

Bus operators in Scotland received £907 million in revenue in 2024-25, an increase of 18% on the previous year. Adjusting for the effects of inflation, total passenger revenue was 12% more than 5 years ago. (*Table 2.8*)

In 2024-25, £392 million, 57% of operator revenue came from concessionary passenger support, and £124 million, 14% came from local or central government: through Network Support Grant or supported services. In the year previous, government support accounted for 57% of operator revenue. Passenger revenue (i.e. ticket sales to non-concessionary passengers) accounted for around 43% of operators' revenue (£391 million). Additional non-revenue support is excluded from these figures, specifically the the Bus Infrastructure Fund. (*Table 2.8 and 2.9*)

In real terms (adjusting for the effects of inflation), funding for concessionary travel is now 29% higher than five years ago and overall passenger revenue is 12 percent more than it was 5 years ago. When looking at these figures it is necessary to consider the passenger number figures in Table 2.2a and the fares data in Table 2.5. Passenger revenue over the last five years has increased despite a 7% decrease in passengers, although when adjusting for inflation, fares have decreased by 6% below general inflation over the same period. (*Table 2.8, 2.2a and 2.5*)

Fares

Bus fares in Scotland have decreased by 6% in real terms (adjusting for the effects of inflation) over the past five years, while the fall for Great Britain was 9%. In current prices, i.e. viewing fare increases in the way that a consumer would, fares have risen by almost 18% over the past five years. The increase in current prices is greater than in Great Britain as a whole which has seen a 15% increase over the last five years. (*Table 2.5*)

Operator costs

As would be expected with the recovery in passenger numbers and service provision (as reflected in vehicle kilometres), operator costs per passenger journey decreased in 2024-25. In 2024-25 operating costs per passenger journey fell by 1% from £2.21 per passenger journey to £2.19. The operating costs per vehicle km is lower than for the rest of GB (excluding London), and operating costs per passenger journey are also lower than GB (£2.19 in Scotland, compared to £2.26 for GB excluding London). See also 'Other sources of data', as more detailed costs data is available from the Confederation of Passenger Transport. (*Table 2.6 and 2.7*)

Passenger Satisfaction

In 2024, the majority of people were satisfied with most aspects of bus services that the Scottish Household Survey asked them about (the relevant questions are currently included in the survey every second year). At least 69% of respondents were satisfied with the extent to which buses ran to timetable; the cleanliness of buses; bus service is stable and not regularly changing; the ease of finding out route and timetable information; feel safe/secure on bus during day; and the simplicity of deciding which ticket they need. (*Table 2.11*)

Respondents gave lower satisfaction scores for the extent to which buses were environmentally friendly and whether the fares were good value (both 64%).

Additionally there was a noticeable difference in those who felt safe on the bus during the day and in the evening. Ninety-four per cent of respondents agreed that they felt safe using the bus during the day compared to 67% in the evening.

Concessionary Travel

The National Bus Travel Concession Scheme for Older and Disabled Persons was rolled out across Scotland in April 2006. The scheme enables individuals aged 60 and over or those with an eligible disability to travel for free on buses across Scotland with a valid National Entitlement Card (NEC).

The Young Persons' (Under 22s) Free Bus Travel scheme launched in January 2022. The scheme provides free bus travel across the country for everyone living in Scotland between the ages of 5 and 21 with a valid NEC (Table 2.13).

Before the Young Persons' scheme was introduced, those aged 16 to 18 and young volunteers aged 19 to 25 were also entitled to discounted bus and rail travel. The Young Persons' scheme is excluded from the analysis here but is included in analysis for table 11.29 in chapter 11.

Although everyone under 22 can now travel for free by bus, young volunteers aged 22 to 25, who live in Scotland and volunteer more than 30 hours a week, can still access discounted fares on almost all local and long-distance buses in Scotland with a valid Young Scot NEC. Additionally, young people aged 16 to 18, or 19 to 25 and a full time volunteer, with a Young Scot NEC can access rail discounts.

Residents on the Western Isles, Orkney and Shetland who qualify for free bus travel under the Older and Disabled Persons' scheme can also get two free return ferry journeys to the mainland each year, as can 16 to 21 year olds who are resident within Orkney, Shetland and the Outer Hebrides from 23 June 2025. Residents on Comhairle nan Eilean Siar (Western Isles), Orkney, Shetland and islands in North Ayrshire, Argyll and Bute and Highland council areas who are aged 16 to 18, or 19 to 25 and a full time volunteer, also receive two free return ferry journeys to the mainland each year.

In addition to the Scottish Government's concessionary travel schemes, some local authorities offer other travel concessions which are also delivered on the NEC. These concessions are available to cardholders who live in that area and are available on a local basis.

The Scottish National Blind Persons' Scheme is also delivered on the NEC, but is not operated by the Scottish Government. This is a voluntary arrangement between local authorities, COSLA and participating transport operators and provides free rail and ferry travel throughout Scotland for eligible cardholders.

As of the end of October 2021, prior to the launch of the Young Persons' (Under 22s) Free Bus Travel scheme, 148,527 young people (aged 16 to 18) had access to concessionary travel with a Young Scot NEC. As of the end of October 2025, over 2.4 million people in Scotland have an NEC which provides access to concessionary travel, consisting of over 836 thousand young people and over 1.5 million older and disabled people. The number of young cardholders has grown rapidly since the introduction of the scheme on 31 January 2022 with an increase seen of 56% between October 2022 and October 2025. The number of older and disabled cardholders has continued to increase steadily each year, with a 20% increase since 2017. (2.13)

The majority of cardholders (89%) in the Older and Disabled Persons' scheme are eligible on the basis of age. Of those who have a pass for disabilities or visual impairments, 76% have a companion card which allows someone to travel with them for free. A breakdown of cardholder numbers by local authority is shown in Table 2.14. Please note that local authority refers to where the card was issued. (2.13)

Details of bus journeys made under the National Concessionary Travel Schemes are included in Table 2.2a. Further details of journeys made on all modes of transport under the National Schemes and current and previous local schemes are shown in Table 11.29. See the personal and cross modal travel section of the user guide for more detail around what is included in this table.

Please note that cardholder data is provided by the National Entitlement Card Programme Office (NECPO) as at close of business 31 October 2025. NECPO support the 32 local authorities by assisting with the integration of various national and local public services on the National Entitlement Card (NEC) and are the joint controller with local authorities of this data. NECPO are working with stakeholders and partners to carry out various data cleansing exercises of the customer database, such as mortality screening, which may impact cardholder numbers. The impact of the work undertaken in this area in 2024 is likely to account for part of the drop in cardholders within the Older & Disabled scheme during 2024. Further data-matching checks are being planned for 2025/26 and beyond.

Other sources of data (not National Statistics)

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

The Confederation of Passenger Transport (CPT) publish a Cost Index on their website. This shows that wages, staffing and labour accounted for around 60% of operating costs, with fuel accounting for 16%. Total costs have been above inflation for the last few years.

The Office of the Traffic Commissioner are responsible for the licensing of the operators of buses and coaches and the registration of local bus services (routes). Statistics are published in the Traffic Commissioners of Great Britain Annual Reports. There were 17 cases of action taken at public inquiry for non-compliance (under the Public Passenger Vehicles Act 1981) in Scotland in 2024-25, 5 more than in 2023-24.



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Published by Transport Scotland, March 2026

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