

Hampshire Bus Enhanced Partnership Annual Progress Report for 2025



Published March 2026

Executive Summary

The **Hampshire Enhanced Partnership (EP)** is a partnership between Hampshire County Council and local bus operators that was formally established in April 2022, which is working to make bus services faster, more frequent, more affordable, better connected offering bus users a better journey experience – this is all being done with the intention of encouraging more people to choose to travel by bus, more often.

The **Hampshire Bus Service Improvement Plan (BSIP)** is the strategy developed by the EP seek to double the number of bus passenger journeys made by 2035 (from 21 million journeys a year in 2022/23 to 42 million journeys a year in 2034/35). The latest version of the Hampshire BSIP was published in June 2024.

More information on the EP and BSIP can be found on the [HCC bus strategy webpage](#).

Section 1 of this report (page 3) summarises bus priority infrastructure improvements completed over the 13 months from November 2024 to December 2025, that seek to make bus services **faster** by improving reliability and punctuality of bus services.

Section 2 (pages 4 to 6) focuses on how Hampshire County Council and local bus operators worked together in 2025 to deliver **more frequent** services across the bus network. It outlines the specific changes implemented, including enhancements to service frequencies, operating hours and service coordination.

Section 3 (page 7) summarises what has been delivered during 2025 using BSIP+ and 2025/26 bus grant funding from the DfT to make bus travel **more affordable**, including promoting the good value fares that are available.

Section 4 (pages 8 to 10) focus on the progress made on various EP initiatives during 2025 to help make places **better connected** by bus. It highlights the key actions delivered to date, outlines where initiatives have been implemented or are underway and summarises how these improvements are contributing to better access, journey reliability and overall network integration.

Section 5 (pages 11 to 17) summarises our efforts during 2025 to deliver a **better journey experience** for bus users. It highlights initiatives focused on improving passenger comfort, accessibility, information provision and overall service quality, and outlines how these measures are helping to make journeys more convenient, inclusive and user-focused across the county.

Section 6 (page 18) summarises the **governance arrangements for the Hampshire EP**. It explains the role the EP Board, the EP Forum and EP Working Group, and provides an overview of the meetings, discussions and updates that have taken place during 2025 including wider engagement activity and stakeholder events.

Section 7 (pages 20 to 24) summarises how Hampshire has fared in the DfT Annual Bus Statistics for 2024/25, published in November 2025.

The following sections outline the improvements and initiatives delivered through Hampshire County Council investment funded by Bus Service Improvement Plan (BSIP) Phase 2 and 2025/26 Bus Grant funding, implemented in partnership with local bus operators and other partners through the Enhanced Partnership. This public investment is complemented by separate commercial investment made directly by bus operators.

Section 1 – Faster (more reliable & more punctual) buses



1.1. Recently completed bus priority improvements and studies

In 2025, the County Council delivered bus priority at traffic signals on the Bluestar 2 (Southampton to Fair Oak), Bluestar 8 (Southampton to Hythe) and Bluestar 9 (Southampton to Langley, Fawley or Calshot) routes. This work has improve bus journey time reliability and punctuality, helping to complement timetable frequency improvements on the Bluestar 2 and 9 delivered by Bluestar.



1.2. Bus priority studies underway







Over the course of 2025, several bus priority studies have been progressed during 2025 to develop and consider options for addressing delays to buses (which could include bus lanes, bus gates, junction improvements or new bus laybys). Once we have reviewed different potential options and discussed these with stakeholders, the next step is to develop proposals for the preferred option. These initial designs will be further developed in 2026 ahead of construction. Feasibility studies that have progressed over the year include:

- Proposals for a southbound bus lane on New Street, Basingstoke
- Designs for Bus Stand improvements at Chestnut Avenue, Eastleigh serving Barton Peveril College
- Improvements to Fareham Bus Station
- Development of bus priority measures for buses in the Hamble Lane area in Bursledon

Section 2 – More frequent services



2.1 Service Enhancements to the commercial network

-  Monday–Saturday frequencies doubled –x2 routes
-  Monday–Saturday frequencies improved –x1 route
-  Later Monday–Saturday evening buses –x2 routes
-  Saturday only frequencies improved –x3 routes
-  Brand new Sunday services –x5 routes
-  Sunday frequencies improved –x4 other routes

A total of over £2.1m of 2025/26 Bus Grant funding was allocated to deliver 17 service uplifts across 14 existing commercial bus services. These uplifts supported a mix of high-frequency urban routes and key inter-urban corridors and included improvements to daytime and peak frequencies, extended early morning and later evening services, and increased weekend provision over a 12-month period.

Operators were allocated indicative funding sums and invited to submit proposals, which were developed through discussion with the County Council to identify timetable and frequency enhancements with a high level of confidence in their longer-term commercial viability.

All successful proposals from each operator were then covered within a Grant Funding Agreement to ensure that funding was spent in line with the Council's

expectations and DfT's guidance. In return for the funding support, the bus operators committed to promoting and marketing the enhanced services to local residents.

These service enhancements were implemented in April, June and the end of August 2025.



Table 1 sets out the commercial bus services supported by 2025/26 Bus Grant funding, including enhancements to service frequencies, span of operation, and days of service.

Doubled frequency!
more buses, better network

18 Bordon
Farnham
Aldershot



Stagecoach
we've got you

Table 1 – List of bus services receiving grant funding for Service Enhancements

Operator	Area	Bus Route & number	Nature of enhancement	Start date of uplift
Bluestar	Southampton/ Winchester	1 – Southampton to Winchester via Bassett, Chandlers Ford, Otterbourne, Compton, St Cross	Higher daytime service frequency Mon- Sat (every 10 mins) & Sundays (every 20 mins)	31 August 2025
Bluestar	Southampton/ Eastleigh	2- Southampton to Fair Oak via. Portswood, Swaythling, North Stoneham, Eastleigh, Bishopstoke	Higher Sunday daytime service frequency (every 20 mins)	31 August 2025
Bluestar	Southampton/ Eastleigh	15 – Southampton to Hamble via. Woolston, Netley	New later evening services Mon-Sat. Last bus from City at around 11pm.	31 August 2025
First	Fareham/ Gosport	E1/E2 – Fareham to Gosport	Improved Mon-Fri peak hour service and Saturday daytime service frequency to increase to every 7-8 mins. Sun service to increase to every 15 minutes.	31 August 2025
First	Fareham/ Gosport	9/9A – Fareham to Gosport	Improved service frequencies on Sat (every 20 min) and on Sun (every 30 mins)	31 August 2025
Stagecoach	Havant/ Portsmouth	20 – Havant to Portsmouth via. West Leigh, Leigh Park, QA Hospital, Cosham	New Sunday service every 30mins via. QA Hospital	6 April 2025
Stagecoach	Havant/ Portsmouth	23 – Havant to Southsea via. Cosham, North End, Portsmouth	Saturday service frequency increased to every 10 mins	6 April 2025
Stagecoach	Test Valley/ Winchester	75 – Andover to Winchester via. Sutton Scotney, South Wonston	New 2-hourly Sunday service	6 April 2025
Stagecoach	Basingstoke & Deane/ East Hampshire	13 – Basingstoke to Alton & Bordon via. Hook, Odiham, Kingsley	New 2-hourly Sunday service	8 June 2025
Stagecoach	Rushmoor, Surrey and East Hampshire	18 – Aldershot to Bordon via. Farnham & Wrecclesham	Mon-Sat service frequency doubled to every 30 mins. New hourly Sunday service	8 June 2025

Stagecoach	Basingstoke & Deane	3 – Basingstoke to South Ham via Worting Road	Service frequency Mon-Sat increased to every 15 mins	31 August 2025
Stagecoach	Rushmoor/ Hart	10 – Farnborough to Church Crookham via Cove, Fleet	New 2 hourly Sunday service	31 August 2025
Stagecoach	Winchester/ East Hampshire	64 – Winchester to Alton via. Alresford, Ropley, Four Marks	Additional AM peak and mid afternoon services. Evening services Mon-Sat increased to every 30mins till 8pm	31 August 2025
Stagecoach	Winchester/ Fareham	69 – Winchester to Fareham via. Fair Oak, Bishops Waltham, Swanmore, Wickham	1 additional AM service Mon-Sat and Sunday service increased to hourly & extended to Fareham	31 August 2025

2.2. Commercial support – to aid recovery and growth on parts of the Core Commercial bus network that required targeted support

In early 2025, bus operators identified a small number of commercial services within their networks that were not at that time fully covering their operating costs from farebox revenue and other sources of funding (including concessionary fares income and the reimbursement from the UK Government-funded capped single fare scheme (£3 from 1 Jan 2025 onwards). These commercial services that been slower to see a recovery in passenger numbers following the Covid-19 pandemic.

Hampshire County Council have agreed with bus operators to provide a contribution of grant funding support the towards the operating costs of these local bus services. These services are being provided with time-limited financial support over a 12-month period from April 2025 to the end of March 2026 to enable operators to continue operating them at the current service frequency levels without the need for timetable reductions. Utilising the funding for this purpose is encouraged within Department for Transport guidance.

Details of the particular bus services receiving this support are commercially sensitive and are therefore not published in this Annual Progress Report. The funding allocations were approved by the Director of Universal Services, in consultation with the Executive Lead Member for Universal Services, prior to funding being awarded.

Section 3 – More Affordable



3.1 Fare initiatives



In 2025, just under £200,000 of BSIP+ and 2025/26 Bus Grant funding was invested in targeted local promotional fare initiatives to encourage passenger growth and improve affordability. This included support for a Stagecoach £1 single-fare promotion in Andover which operated between 27 January to 21st April 2025 and covered the following services:

- 1 (Andover - King Arthurs Way)
- 2 (Town Centre – East Anton)
- 3 (Picket Twenty - Charlton/Saxon Fields)
- 4 (Picket Piece - Drove Estate)

Additional funding was provided to offset the associated revenue shortfall for a further 12-week period, from 22 April to 13 July 2025,

with the initiative running in Andover town for a total of 6 months.

Funding was also provided to support a £1 evening fare promotion on Bluestar services, delivered from April 2025 to March 2026. Hampshire County Council's contribution supported the operation of this initiative within the Hampshire operating area, while Southampton City Council funded the equivalent scheme within the Southampton City Council area, reflecting the cross-boundary nature of the services.



Section 4 – Better Connected



4.1 Northern Test Valley 'Transport on Demand' Pilot Digital Responsive Transport (DRT) scheme

Following a soft launch in March 2025, the Northern Test Valley DRT pilot 'Transport on Demand' officially launched on 16 April 2025. The service is funded by Hampshire County Council and operated by Community First, using a fully accessible Mercedes EVM Cityline minibus and a Mercedes Benz Vito Tourer 9 Seat Minibus.

connect
Transport on Demand
Local, flexible bus journeys

Buses with no fixed routes or timetable.
Choose your own route between **360+** designated bus stops across Northern Test Valley.

FLEXIBLE **LOCAL** **FROM £2**

Available 7am to 7pm
Monday to Saturday

Covers most SP10, SP11 and
SO20 & postcode bus stops

Download the Book a Journey app for the best experience

TAP TO DOWNLOAD ((NFC))

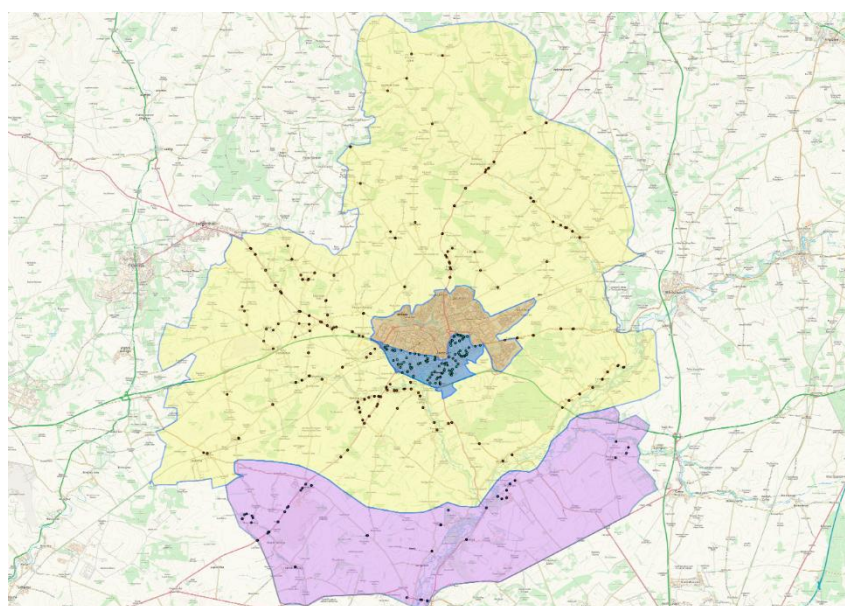
Book on App, Online or Call
cfirst.org.uk/ConnectTOD
0333 015 1271



The service operates Monday to Saturday, from 7am to 7pm, providing flexible, pre-bookable journeys between around 370 bus stops and key destinations in Andover. Journeys can be booked either digitally or by phone, helping to ensure the service is accessible to a wide range of users.

The service operates across four zones, as shown on the map below:

- **Zone 1 (Orange):** Pick-up and drop-off at Andover bus station, Andover train station, Bridge Street (Methodist Church) and Andover War Memorial Hospital
- **Zone 2 (Blue):** Specified bus stops in the SP10 postcode area south of Weyhill Road and London Road, where other bus services do not operate
- **Zone 3 (Yellow):** Specified bus stops in the wider SP11 postcode area



- **Zone 4 (Pink):** Specified bus stops in the Wallops, Chilbolton, Stockbridge and Barton Stacey areas

Between April and December 2025, the service recorded **over 8,000 passenger trips**, with more than **1,000 people registering** to use the service. The Transport on Demand service is seeing around **350 trips** (single journeys) **made a week**. Around one-third of all journeys were shared with other passengers, demonstrating efficient use of vehicle capacity and supporting value for money.

Demand has been strongest on weekdays between 08:00 and 15:00, reflecting the service's role in supporting everyday trips such as shopping, appointments and social travel.

Passenger feedback has been very positive, with 98% of ratings recorded as 4 or 5 stars as of November 2025. Over £4,500 in passenger discounts were redeemed during the reporting period, supporting affordability and encouraging repeat use.

These early results will be used to inform ongoing service development during the remainder of the pilot and to support future decisions on the role of demand-responsive transport within Hampshire's wider public transport network.

4.2 Bus Route Investment Plans

HCC and bus operators are making good progress in developing Bus Route Investment Plans (BRIPs) for the 22 'High Frequency Urban' and 25 'Main Inter-urban' bus routes in Hampshire. Details of these growing and important commercial bus routes are set out in Section 5 of our BSIP [here](#). Each BRIP summarises information on the bus service frequencies, main drivers of demand, recent trends in passenger growth, levels of punctuality and gives details of planned development or regeneration projects along the route that could generate passenger growth. An important input into the plans are audits are carried out of the condition and facilities available at all bus stops along these routes.

The BRIPs set out bus operator plans and aspirations for improvements to bus services on the route, such as enhanced frequencies and they set out which development opportunities could help to generate passenger growth. The BRIPs are produced jointly with the bus operators. Each BRIP will include a costed and prioritised package of infrastructure improvements to bus stops and shelters, proposed bus priority measures and changes to parking and junction layouts along the full length of each corridor and estimates the expected overall reduction in end-to-end journey times if the full corridor package of measures were to be delivered. The BRIPs will be used to help inform discussions with Borough and District Councils on Local Plan preparation and with developers about the scope and scale of funding contributions to support local bus improvements related to their sites.

As of November 2025, BRIPs have been completed for 13 of the 47 high-frequency urban and main interurban routes, with a further 22 BRIPs partially complete or at draft stage. Strong progress is being made across the programme, with all remaining BRIPs scheduled for completion by November 2026. For services operating across Local Transport Authority (LTA) boundaries, neighbouring LTAs are engaged with.

4.3. Community-Led Transport Grant

In October 2025, HCC launched the Community-Led Transport Grant to enable local communities to develop, fund and deliver their own local transport solutions where there are gaps in the existing bus network. Funded through the 2025/26 Bus Grant, the CLTG scheme

grants can be used to promote existing community transport services, to raise awareness of their availability for the communities they serve and also to develop or expand new, locally led provision, particularly in rural and underserved areas.

A total of £300,000 of 2025/26 Bus Grant funding has been made available for the Community-Led Transport Grant, via two application routes:

- **Stream A: Publicity Funding for Existing Services** – this grant provides a fixed £500 grant to help community groups to promote any existing transport services that operate and are either not being used to their full potential by people, and whether awareness levels of these services may be low. Local community groups can use this funding to carry out targeted marketing and print and distribute publicity material to increase awareness and usage.
- **Stream B: Develop or Expand a Community-Led Transport Service** – this grant stream is to support community groups that want to develop and operate new community-led transport services or the improvement of existing ones, helping communities deliver flexible, locally tailored solutions that improve access to essential services such as education, healthcare, employment and shopping, while reducing social isolation.

The intention is that the grant stream be continued in future financial years. Full details of the grant scheme and how organisations can apply are available here:

<https://www.hants.gov.uk/community/grants/grants-list/community-led-transport-grant>

The grant scheme seeks to reduce isolation and improve connectivity by supporting bottom-up transport solutions for areas that have unmet transport needs or low awareness of an existing provision. The closing date for applications is 28 February 2026.

Section 5 – A Better journey experience



5.1 Fleet investment by bus operators

In 2025, Bluestar made significant fleet investments to support service quality, capacity and passenger experience across its network. In April, Bluestar invested £2.9 million to introduce 10 new double-deck buses into service on the Bluestar 1 route between Southampton and Winchester. This investment was strengthened by the addition of a further five double-deck vehicles in September 2025.

In addition, eight new single-deck buses and a number of double decker buses were deployed on Bluestar 9, that connect Southampton and destinations including Hythe, Blackfield, Langley and Fawley with services between these places operating every 20 minutes.



Further investment was also made by Bluestar to improve capacity on sixth-form college transport services. In September 2025, 10 new high-capacity double decker buses were introduced on the routes that serve the Chestnut Avenue stops on Barton Peveril College.

In addition to new buses, bus operators have invested in improvements to on-bus next stop information. In the Portsmouth and South East Hampshire area, most buses on routes that serve rail stations now provide live train departure information as buses approach the relevant station. Bluestar have also added now this for all their services that serve rail stations.



5.2 Bus stop audits and bus stop infrastructure improvements

Comprehensive audits of bus stop and shelter infrastructure have been completed across Hampshire to establish a countywide baseline condition. Initial audits were undertaken in 2024 across five areas: Rushmoor Borough, Gosport Borough, Havant Borough, Hart District, and Basingstoke and Deane. During 2025, this work was extended to the remaining

districts, including Test Valley, Winchester, East Hampshire, Eastleigh, Fareham, and the New Forest. Together, these audits provide a robust evidence base to inform the prioritisation of maintenance, upgrades and future investment in bus stop infrastructure.

Using this baseline, investment during 2025 was targeted at locations in the poorest structural condition. Approximately £2.5 million was allocated to the repair and refurbishment of bus shelters, supporting a programme of improvements across existing bus stop and shelter infrastructure. Along the A3 Bus Corridor between Clanfield and Portsmouth, 45 shelters were refurbished during the year. Overall, this investment resulted in the refurbishment or repair of 105 bus shelters within Rushmoor and 300 bus stops (poles) across the county in 2025.

Building on this work, it was announced in January 2025 that 151 bus shelters across Rushmoor, Hart and Gosport would be upgraded through a 10-year partnership between Hampshire County Council and Clear Channel. This longer-term programme will further enhance passenger facilities while supporting the Council’s wider sustainability and carbon-reduction objectives.



Purbrook St. John the Baptist (SW-bound), London Road



Waterlooville Precinct (Stop A), Saint Georges Walk



Clanfield, opp. St Michaels Way, London Road



Hordean, opp. Precinct, Portsmouth Road

5.6. Real Time Passenger Information (RTPI) investment

During 2025, substantial progress was made in modernising real-time passenger information (RTPI) across Hampshire. In Basingstoke and Winchester, new RTPI installations are nearing completion, with



approximately £1.2m of funding used to replace a number of older displays that are reaching the end of their operating life. The final phase of the programme is scheduled for early 2026, with around 40 additional RTPI units planned for installation.

Alongside this, investment in 2025 has focused on essential technology upgrades across the RTPI network, including the widespread conversion of equipment from 3G to 4G.

Collectively, these improvements are strengthening the resilience of the RTPI systems and delivering more reliable and accurate information for passengers across the county.

5.3 Hampshire Independent Travel Training Grant

In late 2024, Hampshire County Council launched an Independent Travel Training (ITT) Grant to support adults who experience difficulties using local bus services, with the aim of building confidence, skills and independence when travelling on the Hampshire bus network. In October 2024, three organisations were awarded funding to pilot delivery over an initial six-month period, with the option to build on learning from the pilot phase.



The 2025 Travel Training pilot demonstrated the value of targeted, person-centred support in improving confidence, independence and social inclusion for people with disabilities and sensory impairments. Delivered by three community organisations, the six-month pilot engaged 40 participants through 48 sessions and around 30 supported journeys, with 18 individuals progressing to independent travel.

Flexible delivery models, combining online engagement with practical, community-based support, proved effective in reaching individuals who are often socially isolated or initially hesitant to travel. Peer-led approaches and involvement from people with lived experience were particularly impactful, helping participants to build confidence, reduce anxiety and develop practical travel skills. Many participants reported stronger connections to their

local communities and greater willingness to use public transport independently.

The pilot also generated valuable insights for future delivery. Rural transport challenges, ongoing post-COVID mental health impacts, and limited bus operator engagement remain barriers for some users. However, these findings have helped shape clear next steps, including greater use of peer support, volunteer travel buddies, digital outreach, and strengthened collaboration with operators.

The success of Tranche 1 of the pilot enabled the programme to continue. In summer 2025, one organisation secured a second round of funding (Tranche 2), allowing it to extend its scheme through to December 2025 and maintain consistent support while enabling further participant progression across a number of locations across Hampshire. A supplementary report on the organisation's progress is expected in early 2026.

Overall, the pilot established a strong foundation for future BSIP-funded travel confidence initiatives and demonstrated how inclusive, end-to-end support can play a key role in widening access to bus travel across Hampshire.

5.4. Gosport TravelSafe Partnership Pilot project

This project is being delivered in partnership with Portsmouth City Council and Gosport Borough Council and seeks to reduce the number of incidents of vandalism, criminal damage and anti-social behaviour (ASB) at locations on the bus network in the Gosport area, including improving bus users' perceptions regarding personal safety and security. The project comprises two complementary elements:

- Uniformed patrols on the bus network during evenings and afternoons
- New CCTV cameras to cover locations where vandalism and ASB have occurred

During 2025, project scoping and planning work for the Gosport Travel Safe Partnership pilot has progressed well. This focused on working with project partners to define what will be delivered as part of the project. During the autumn, a number of private security patrols were undertaken to identify hotspot locations for anti-social behaviour around Gosport Interchange and along key bus routes, helping to shape a targeted approach to future interventions.

In parallel, preparatory work has been carried out to support improvements to passenger safety. This has included the development of job roles and responsibilities for a team of new dedicated Travel Safe officers. A number of lighting improvements have been planned, which will be delivered in 2026. Vegetation around overbridges on the Eclipse busway has been cut back to improve bus driver visibility of bridge parapets. Further cutting back of vegetation is planned in February 2026 to improve sightlines for bus drivers and passengers approaching bus stops.

Recruitment for the team of new Community Safety Accreditation Scheme (CSAS)-accredited Travel Safe patrol officers commenced in early 2026, with these uniformed patrols expected to commence in spring 2026. This work has been informed by visits to Bournemouth Christchurch and Poole Council to see how their Travel Safe patrols work. In parallel, work is underway to order new CCTV cameras at Gosport Interchange and along the Eclipse BRT busway. These are due to be installed by the autumn of 2026, and will be monitored live from a CCTV control room alongside the planned replacement of all bus shelters on the Eclipse corridor and associated lighting enhancements. The new shelters will look like the visualisation below:



5.5. Rural Bus Shelter Grant Stream

Around 160 Town and Parish Councils in Hampshire are responsible for looking after approximately 640 bus shelters.

In October 2025, HCC launched the Parish Bus Shelter Grant Scheme to help Parish and Town Councils to provide funding towards improving passenger waiting facilities at local bus stops. A total of £400,000 has been allocated from the 2025/26 bus grant funding to deliver the scheme, with grants of up to £15,000 per site available to support either the refurbishment of an existing bus shelter or the installation of a new shelter at an existing stop where there is an active bus service.

By improving the quality, visibility and appeal of bus shelters, the scheme aims to enhance the passenger experience and support increased bus use, with parishes required to commit to the ongoing ownership and maintenance of the shelter(s).

Full details of the grant stream including how to apply can be found here:

<https://www.hants.gov.uk/community/grants/grants-list/parish-council-bus-shelter-grant>

At the closing date for the first round of applications – as at 28 February 2026, there had been applications to improve or replace 120 bus shelters using this grant. As there has been such strong interest and a high number of applications, the intention is that the grant stream be continued in future financial years, as well as broadening the scope to permit applications for new bus shelters at well used bus stops that currently lack a shelter, where these stops have a regular bus service.

5.7. Bus Interchange Improvement Plan

The Bus Interchange Improvement Plan will identify and describe current infrastructure and information provision at bus stations and busy bus hub locations, any deficiencies in the quality of the environment at each location and make any recommendations that would make bus stations and interchanges easier to use and more attractive and accessible for bus passengers including indicative costs for improvements. The recommended improvements could range from low-cost measures such as additional timetable information, through to improved footways in the vicinity of bus stations and higher cost improvements such as a new bus station build.

Audits of passenger facilities were carried out by Hampshire County Council officers across the 8 bus stations and 15 busier bus hubs during the second half of 2025. This work will inform the development of a costed and prioritised programme of improvements at key interchanges, aimed at enhancing the passenger waiting experience. A full report setting out the findings and recommended investment priorities will be produced in early 2026 to support future funding and delivery decisions. The bus stations and bus hubs that will be covered are:

Bus Stations

- 1 Basingstoke Bus Station
- 2 Andover Bus Station
- 3 Winchester Bus Station
- 4 Romsey Bus Station
- 5 Fareham Bus Station
- 6 Gosport Interchange
- 7 Havant Bus Station
- 8 Eastleigh Bus Station

Bus Hubs

- 1 Kingsmead, Farnborough
- 2 Alencon Link, Basingstoke
- 3 North Hampshire Hospital, Basingstoke
- 4 High Street/ Normandy Street, Alton
- 5 Winchester Rail Station
- 6 Southampton Airport Parkway Station
- 7 The Square, Fair Oak
- 8 Hedge End Sainsburys/M&S

Bus Hubs (continued)

9 Commercial Road, Totton

10 Hythe Pier, Hythe

11 High Street, Lymington

12 Meeting House Lane, Ringwood

13 Waterloo Precinct (Stops A & B) and London Road (Stops D & E), Waterlooville

14 Crookhorn Precinct

15 Fareham Rail Station A27 The Avenue Stop R/Q & West Street Stop S

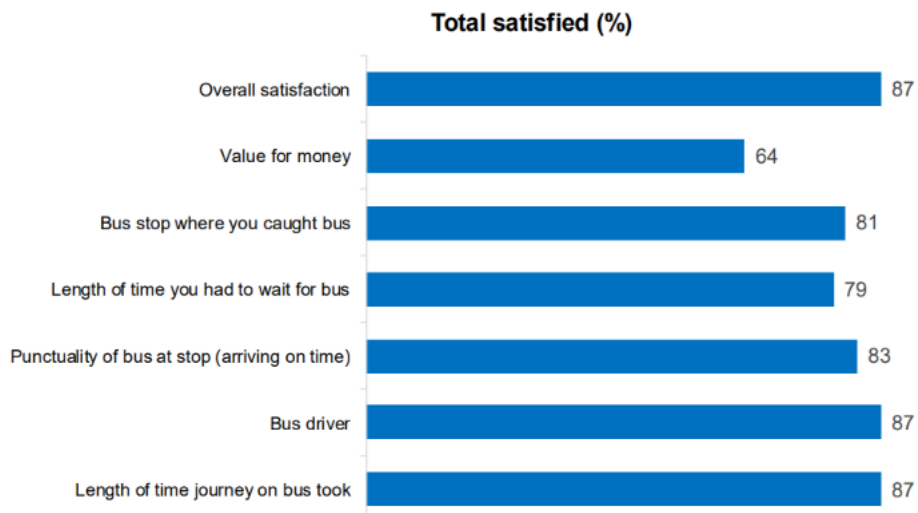
5.4 Monitoring bus passenger satisfaction

In 2025, Hampshire County Council continued its participation in Transport Focus's [Your Bus Journey](#) survey programme, which it joined in February 2024. Each year, the level of bus passenger satisfaction from a sample of around 1,000 This nationwide survey, delivered by independent market research company BVA BDRC, provides robust, on-demand insight into bus passenger perceptions across a wide range of journey-experience metrics. Through the programme, the Council is able to access aggregated data on satisfaction relating to key factors such as reliability, waiting times, the level of customer service provided by the bus driver, value for money, and overall levels of bus passenger satisfaction.

The results play an important role in helping the Council identify where further investment in public transport and active travel is needed. They also provide a valuable evidence base to support capital funding bids and to demonstrate the impact of improvements on accessibility, network performance, and wider levelling-up objectives.

In March 2025, Transport Focus published the [2024 national results](#), covering 48,000 journeys across England, Scotland, and Wales. These provide a benchmark for passenger views on bus journey experience. Hampshire ranked 19th out of 39 English LTAs for overall satisfaction. Satisfaction with local operators was in the top 60%, with commuting and shopping identified as the most common journey purposes. Hampshire met or exceeded the national average across most areas, particularly driver performance and journey time. Overall satisfaction was 86%, with higher scores among off-peak and older passengers.

An interim report on the 2025 results, received in September, shows an encouraging increase in overall satisfaction of around 1–2% compared with 2024, based on approximately 40% of the 1,000 surveys dataset that had been processed and analysed.



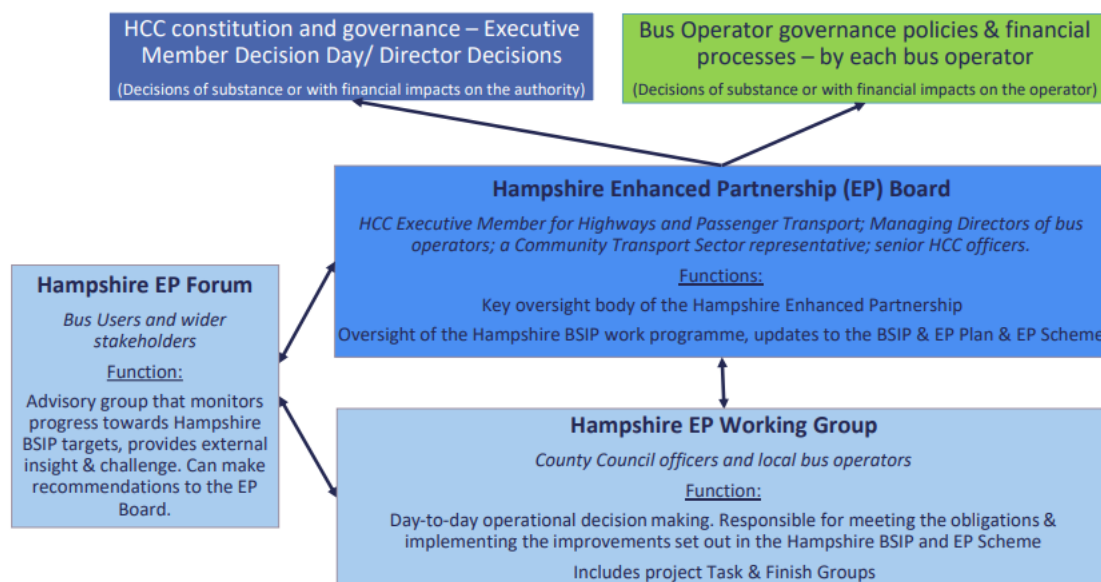
Notably, satisfaction with punctuality and waiting times has increased significantly. These measures are now broadly in line with the semi-rural comparator average and are performing above the all-England average.

Overall, the interim findings from 2025 indicate an improvement in most metrics, apart from value for money (which follows the increase in the capped single bus fare to £3 from 1 January 2025 – which was previously £2 per single journey). Transport Focus are currently in the process of collating survey data collected in the autumn of 2025. As this survey data is analysed, the national Your Bus Survey results are expected to be published in early summer 2026. The final results will allow for a fuller assessment of trends and performance. Any areas requiring improvement will be considered as part of future funding and delivery planning, including potential early interventions to further boost passenger satisfaction where needed.

Section 6 – Hampshire Enhanced Partnership (EP) Governance updates

EP Governance arrangements

The chart below summarises the governance arrangements for the Hampshire EP and the responsibilities at the level of the EP Board, EP Working Group and EP Forum.



EP Meetings and updates

In 2025, we have:

- Held 3 EP Board meetings (in February, May and November 2025) and 3 Hampshire EP Forum meetings (in February, May and October 2025) attended by a number of bus user representatives from different parts of Hampshire. Monthly EP Working Group meetings with operators also took place.
- The format and invite list for EP Forum meetings was expanded from October 2025, with new representation from disability and visual-impairment groups, increased female representation, NHS partners, more Borough and District Council attendees, additional neighbouring LTAs, and more bus users. This also broadened the geographical profile of our feedback. Together, these changes have enabled better challenge and more diverse representation from a wider range of bus users.
- Held two online Passenger Transport Forum briefing and Q&A in September 2025 where HCC and bus operators provided updates to wider stakeholders who included county councillors, District and Borough councillors and Town and Parish Council representatives.
- Met monthly with Southampton City Council and frequently with Portsmouth City Council to discuss cross-boundary initiatives, and a number of times with neighbouring Local Transport Authorities, including, Surrey, Wiltshire and Dorset.
- Worked with transport planning colleagues within the wider HCC strategic transport team to discuss how we can better optimise public transport as part of planning and delivery of new developments to ensure the best modal share.
- Several HCC officers attended the Quality Bus Conference on 23rd/24th September at the Portsmouth Guildhall which was an event supported by the Bus Centre of

Excellence and organised by Landor LINKS, which brought together local authorities, consultants, service providers to share best practices across the bus sector. As part of the study tours, a group of delegates was taken for a tour of the Eclipse Bus Rapid Transit busway connecting Gosport and Fareham, including a visit to First Solent's Hoeford depot to see the electric bus charging infrastructure installed in autumn 2024.

- In June 2025, HCC received £13,019,411 of 2025/26 'Bus Grant' funding (of which ~£7.5m is capital and ~£5.3m of revenue funding, with the remainder for LTA staffing costs). This funding has been invested in the various initiatives and projects summarised in previous chapters.
- Received confirmation that Hampshire County Council has secured £27.2m of capital funding from the Department for Transport and £24.9m revenue funding over a four-year period, starting from the 2026/27 financial year following [DfT's announcement](#) on 5th December 2025.

Section 7 - Monitoring Progress – DfT Bus Statistics

We conclude this year’s Annual Progress Report by giving an overview of the DfT annual statistics on bus passenger numbers and bus punctuality to show at a high level how Hampshire’s bus network is performing compared to five other comparator areas – the shire counties of Oxfordshire, Surrey and Kent that share similar travel and demographic characteristics, and the neighbouring unitaries of Portsmouth and Southampton. The DfT Annual bus statistics (year ending March 2025) report that around 27 million bus journeys were made in Hampshire in 2024/25 — a 6.8% increase on the previous year.

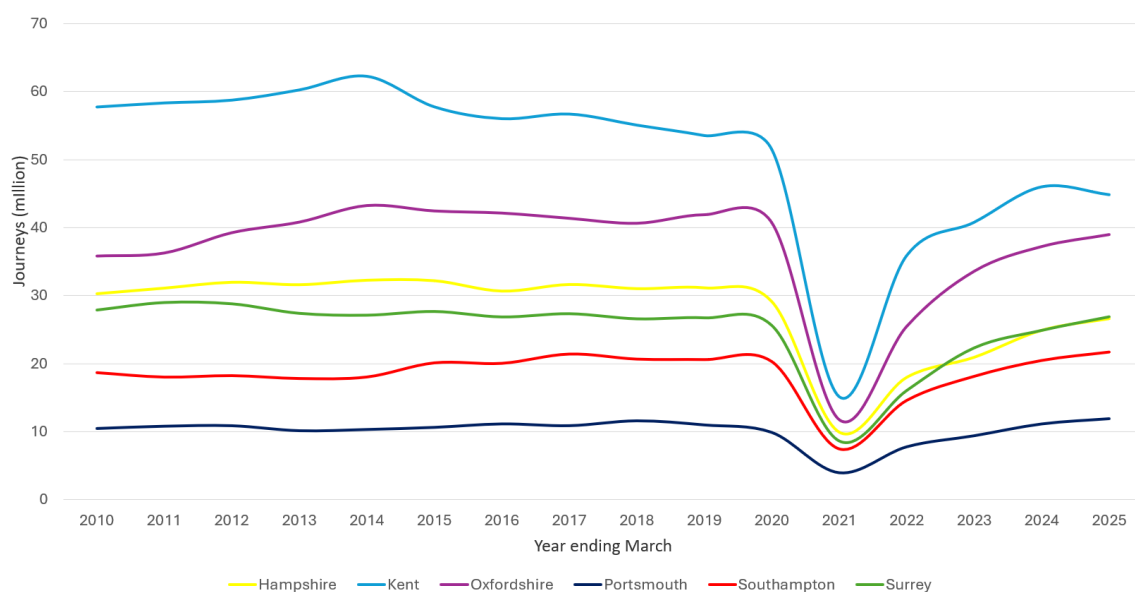
This continued growth is enabled by BSIP investment in more frequent bus services, investment in bus shelters and real-time information to enhance the at stop waiting environment and investment by bus operators in new buses. The four graphs (Figures 1-4) below illustrate how bus use has changed in the six areas since 2010, covering the recovery from COVID and recent steady growth. They also show how different types of bus user have contributed to that change. Figure 5 shows a more complex picture for the percentage of local bus services running on time.

Total number of Bus Passenger Journeys a year

Figure 1 below shows a steady recovery in Hampshire’s bus use since the sharp fall in 2020/21. Before the pandemic, there were typically 30–32 million bus journeys a year made in Hampshire. While numbers have not returned to that level, the rise from 18.38 million in 2021/22 to 27 million in 2024/25 represents strong progress.

Surrey, Oxfordshire, Portsmouth and Southampton have undergone a faster recovery than Hampshire, whereas in Kent the recovery in the years immediately after the pandemic appears to have slowed. The consistent year-on-year growth suggests that the £2 and 3 single fare caps and BSIP investment in service enhancements, targeted promotional fares initiatives and bus shelters is encouraging Hampshire residents to make more journeys by bus, with Hampshire getting closer to pre-COVID baseline levels of annual bus use.

Figure 1: Local bus passenger journeys (millions) in Hampshire, neighbouring unitary authorities and comparator shire areas [DfT Annual Bus Statistics Table 01E]

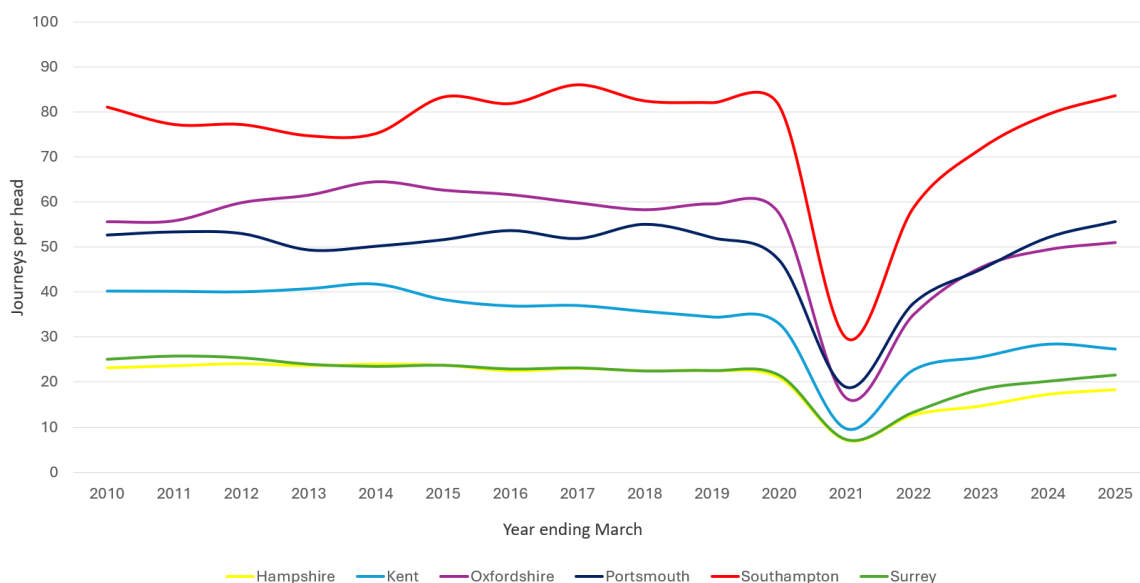


Bus Journeys per head of population per year

Figure 2 below shows that Hampshire residents now make around 18 bus trips per year, close to pre-pandemic levels. As a geographically large county with lower population densities, particularly outside main urban areas, it is to be expected that Hampshire has lower per-person bus use than denser larger urban areas like Portsmouth or Southampton.

However, the gradual increase since 2020/21 indicates a steady return to regular bus travel, similar to that seen in Surrey but lower than levels seen in Oxfordshire. Continued investment in 2025 — including bus frequency improvements, new traffic signal bus priority, fleet investment by operators and targeted promotional fares initiatives is expected to support further growth and see journeys per head increase to equal then exceed pre-2020 levels.

Figure 2: Passenger journeys per head: Hampshire & neighbouring unitaries & comparator shire authorities [DfT Annual Bus Statistics Table BUS 01F]

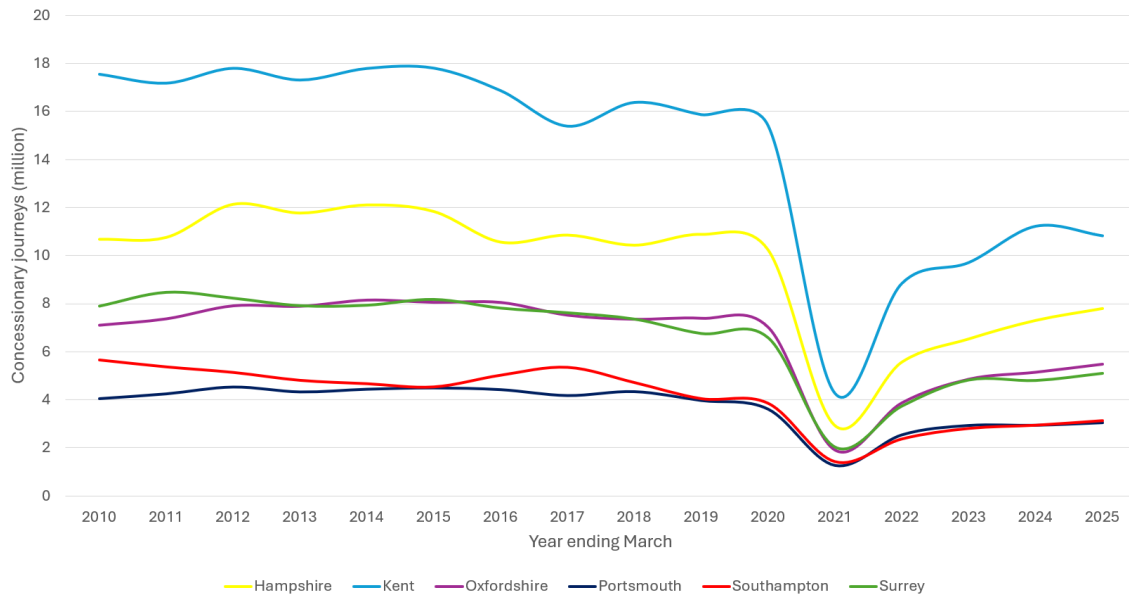


Total Bus Journeys a year made by Concessionary Pass holders

Before the pandemic, Hampshire recorded 10–12 million concessionary journeys per year, making it one of the highest-demand shire counties, second only to Kent within the group of comparator authorities shown in the graphs. As Figure 3 shows, concessionary use in Hampshire and other comparator areas fell sharply in 2020/21 but has grown steadily since.

Hampshire’s recovery pattern is similar to Oxfordshire and Surrey, reflecting comparable demographics. The ongoing upward trend suggests that older and disabled residents are gradually returning to bus travel, potentially encouraged or supported by BSIP investment in improvements in bus stop accessibility and bus service enhancements.

Figure 3: Total Bus Journeys using Concessionary Travel Passes (million): Hampshire & neighbouring unitaries & comparator shire authorities [DfT Annual Bus Statistics Table BUS 01G]

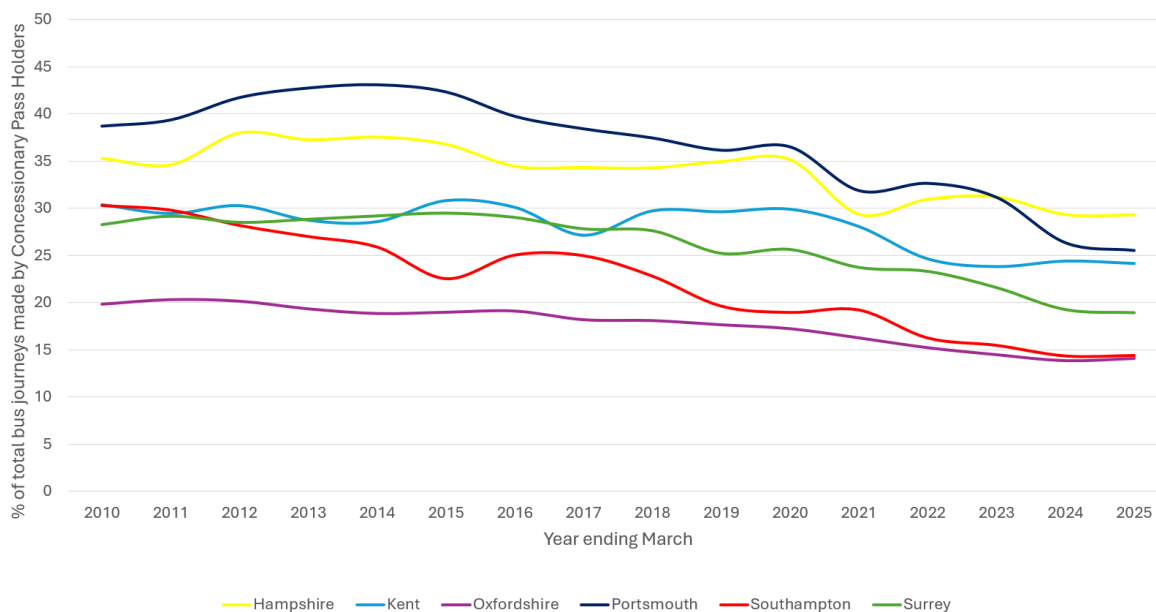


Trend in share of Concessionary Travel as % of total bus journeys

Figure 4 highlights a long-term decline in the proportion of total bus journeys made in Hampshire and in five other comparator areas using concessionary passes — from about 35% in the early 2010s to just under 30% in 2024/25.

The pandemic caused a sharp drop, and although the share has since increased slightly, recovery since then has been slow and uneven. This mirrors national trends in shire areas and reflects wider changes in travel behaviour among older and disabled residents.

Figure 4: % of Total Bus Journeys made by Concessionary Pass Holders: Hampshire & neighbouring unitaries & comparator shire authorities [DfT BUS 01H]



% of Bus Services Running On Time

Figure 5 highlights a trend of considerable variability of the percentage of bus services running on time. Before the pandemic, between 80% and 87% of bus services in Hampshire were on time. This was higher than in Surrey, Oxfordshire and Southampton, but lower than in Kent and Portsmouth. In all areas, punctuality improved in 2020/21, aided by lower traffic volumes and less congestion during the pandemic, but in most places it fell in 2021/22 and again in 2022/23 to levels below pre 2019/20 in most of the areas.

In Hampshire between 2023/24 and 2024/25 bus punctuality fell from 73% to 69%, below all of the comparator areas. This worsening of punctuality may be due to a combination of worsening congestion and an increase in the volume of street works being carried out by utilities companies compared to previous years.

Figure 5: % of Bus Services Running On Time* Hampshire & neighbouring unitaries & comparator shire authorities [DfT BUS09A] - *On Time defined as running between 1 minute early and 6 minutes late. Data is for bus routes with five or fewer buses per hour.

