Public Transport: Our 2025 Insight Scan

Expert insights - themes, trends and predictions for the UK Public Transport in 2025

hedgehog lab

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Introduction

As we navigate the rapidly evolving landscape of public transport, it becomes increasingly important to understand what is shaping the industry. This whitepaper explores the critical themes, challenges, and opportunities shaping the industry in the near future, offering forward-looking insights into how transport providers can adapt and thrive.

From addressing long-standing customer pain points to embracing innovative technologies, the public transport sector is poised to become more integrated, data-driven, and user-centric. However, success will depend on overcoming persistent challenges, such as fragmented services, inconsistent standards, and the digital divide. By fostering collaboration, implementing forward-thinking strategies, and avoiding common pitfalls, the industry can ensure it remains a vital and trusted cornerstone of mobility across the UK.

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Insights - Public Transport 2025

As we approach 2025, the public transport landscape faces a dynamic convergence of emerging trends, technological advancements, and evolving customer expectations. This analysis draws on expert contributions to outline key trends, actionable recommendations, and areas of caution for transport operators. It highlights the necessity of balancing operational efficiency with sustainability goals and customer satisfaction, offering a roadmap for achieving resilience and growth in an ever-changing landscape.

We engaged three industry professionals to share their perspectives on key trends, pain points and innovations likely to redefine the public transport experience by 2025.

8 Core Trends by Industry Professionals.

1

Customer Pain Points
Address passenger concerns such as reliability, accessibility and fare transparency

Back Office Pain Points 2
Streamline operational processes through tech and improved data sharing

3

Infrastructure Challenges
Modernise outdated systems and ensure service availability in underserved areas

Provider and Supplier Dynamics 4
Adapt to regulatory changes and advance sustainability practices

5

Digital Inclusion
Bridge the digital literacy divide and enhance tech accessibility

Sustainability Enhancements 6
Implement environmentally conscious strategies for greener transport

7

Industry Trends and Future Themes
Prediction of industry shifts driven by data, tech and customer expectations

Pitfalls to Avoid 8
Highlight common industry missteps and offer mitigation strategies

This comprehensive exploration offers actionable recommendations and CX value adds designed to inform strategic decision-making in public transport management. By fostering collaboration among operators, suppliers and policymakers, we can shape a more inclusive, efficient and sustainable public transport system.

Key Themes, Trends and Predictions

1. Customer Pain Points

Navigating Customer Expectations

Passengers across the UK consistently highlight reliability, accessibility, and affordability as top priorities when using public transport. To address these challenges, operators must embrace customer-centric solutions. This includes delivering timely, real-time updates, particularly in areas like Greater Manchester where local authorities are looking to enforce data-sharing mandates in response to public campaigns. Simplifying fare systems and investing in comprehensive driver training programmes are equally vital to ensure that services are accessible, inclusive, and easy to navigate for all demographics. Crucially, bridging the digital divide is essential—ensuring that those who are less tech-savvy or lack access to modern devices are not left behind.

Key Issues

Reliability and Trust
Passengers often express frustration over unreliable services. Frequent delays, unexpected cancellations, and a lack of timely updates leave customers feeling stranded and unable to plan their journeys with confidence. Building trust hinges on improving service consistency and communication.

Complex Fare Structures
Many customers struggle with opaque and inconsistent fare systems. From unclear pricing across different modes of transport to an absence of integration between operators, navigating costs is unnecessarily complicated. This complexity often deters potential passengers and penalises infrequent users who may lack familiarity with the system.

Accessibility and Inclusion
Accessibility remains a significant concern, especially for disabled passengers and those requiring additional support. Issues such as poorly trained staff, inconsistent availability of priority seating, and limited accessibility features in apps and on vehicles create barriers to independent travel.

Digital Divide
The growing reliance on digital platforms for journey planning, ticketing, and service updates excludes many passengers. Those unfamiliar with technology, or who lack access to smartphones or the internet, are often left without vital information. Additionally, many systems fail to offer multilingual support or compatibility with older devices, further compounding the issue.

Recommendations

Enhanced Reliability Through Real-Time Updates
Transport operators must prioritise accurate, real-time updates to rebuild trust. While concerns about data sharing among competitors are valid, local mandates—such as those in Greater Manchester—demonstrate that collaboration can drive better outcomes for passengers. Bus tracking, live journey notifications, and instant alerts for disruptions should be standard across all operators.

Simplified and Transparent Fare Systems
Fare structures should be easy to understand and predictable, potentially using zone-based or dynamic pricing models to reduce confusion. Integration across modes of transport (e.g., buses, trains, trams) with unified ticketing solutions can enhance the passenger experience.

Comprehensive Accessibility Initiatives
All staff, particularly drivers and conductors, should undergo robust training in disability awareness and passenger support. Technology should look to enable features like app-based priority seat reservations and voice announcements for visually impaired passengers, ensuring equitable access.

Bridging the Digital Divide
Transport systems must cater to non-tech-savvy users through offline solutions and intuitive platforms. Backwards-compatible technology that works on older devices, printed schedules, and multilingual support are critical to fostering inclusion. Education campaigns on digital tools for journey planning and ticketing could also help empower users to make the most of modern services.

2. Back Office Pain Points

Optimising Back-Office Operations

The efficiency of back-office operations underpins the smooth running of public transport systems. However, many operators face significant challenges due to outdated technologies, fragmented systems, and a reluctance to collaborate. Legacy systems and insufficient technical expertise hinder the adoption of modern solutions, while competitive concerns often stall data-sharing initiatives.

To remain competitive and deliver a seamless passenger experience, operators must modernise their back-office operations. This includes transitioning to cloud-based

infrastructures, fostering secure data-sharing practices, and streamlining workflows through automation and improved onboarding processes for new technologies. Collaboration across the sector is critical, with opportunities to share best practices and integrate systems for mutual benefit.

Key Issues

Technological Knowledge Gaps

Many back-office teams lack the expertise to implement and maintain modern software delivery processes, such as Continuous Integration and Continuous Deployment (CI/CD). This limits their ability to adopt agile workflows and deliver updates efficiently.

Reluctance to Share Data

Competitive tensions between operators often create a reluctance to share key data, such as passenger flows, route efficiency, and real-time service updates. While protecting commercial interests is important, this siloed approach limits opportunities for integrated transport services that could benefit passengers and reduce inefficiencies.

Legacy Systems

Outdated and fragmented legacy systems are a pervasive issue. These systems are often incompatible with newer technologies, making upgrades, integrations, and service improvements difficult and costly. Maintaining these systems also demands disproportionate resources, diverting funds from innovation.

Resource Constraints

Back-office teams frequently operate under tight budgetary and staffing constraints. This limits their ability to experiment with new technologies or implement best practices in process optimisation and service delivery.

Recommendations

Cloud Migration and Technology Upgrades

Transitioning to cloud-based systems offers significant benefits, including improved scalability, reduced maintenance costs, and enhanced data security. A robust and modern technical infrastructure can also support real-time data processing and predictive analytics, empowering operators to optimise routes and anticipate service disruptions.

Secure Data-Sharing Agreements

Operators must strike a balance between protecting their competitive interests and collaborating for the greater good of the transport network. Secure and anonymised data-sharing agreements, such as those enforced in Greater Manchester, can help operators exchange insights without exposing sensitive commercial information.

Comprehensive Training and Onboarding

Effective onboarding programmes are essential to equip back-office teams with the skills to implement and manage new technologies. Training should focus on key areas such as CI/CD

pipelines, data management, and automation tools, fostering a culture of continuous learning and innovation.

Future-Proofing Technology Investments
Operators must ensure that any new technology is flexible and interoperable with existing systems to avoid creating new silos. Investing in open standards and modular solutions can help facilitate future upgrades and integrations.

3. Infrastructure Pain Points

Strengthening Infrastructure

The UK's public transport infrastructure faces critical challenges in meeting the needs of a diverse and geographically dispersed population. Post-pandemic service reductions have left many rural and underserved areas with limited access to reliable transport, exacerbating social and economic inequalities. Additionally, the lack of cross-operator ticketing systems and insufficient integration across modes of transport create unnecessary barriers for passengers, reducing convenience and overall usage.

A strategic approach to rebuilding and modernising transport infrastructure is essential. Expanding on-demand services, developing unified ticketing solutions, and fostering greater public and private investment can address these challenges, improving connectivity and passenger experience. Collaboration between transport operators, local authorities, and central government will be key to sustaining long-term growth and ensuring the system is fit for purpose in the face of evolving demands.

Key Issues

Service Reductions in Rural Areas
Post-Covid declines in passenger numbers have driven route cancellations and reduced service levels, particularly in rural areas. This has left many communities isolated, limiting access to employment, education, and healthcare.

Lack of Interoperable Ticketing
Passengers frequently encounter complications due to fragmented ticketing systems that fail to integrate across different operators or modes of transport (e.g., buses, trains, trams). This lack of interoperability increases costs, creates confusion, and deters multimodal journeys.

Aging Infrastructure
Many transport networks rely on outdated physical infrastructure, such as rail lines, bus depots, and terminals, which struggle to accommodate modern vehicles or meet current passenger expectations for accessibility and comfort.

Inadequate Government Investment
While demand for public transport continues to grow in urban areas, investment in infrastructure has lagged behind, limiting the ability to expand capacity, electrify networks, or

improve service frequency. Rural and less economically developed regions are particularly affected by these funding shortfalls.

Recommendations

Expand On-Demand Services in Rural Areas
To address gaps in rural coverage, transport operators should expand flexible, on-demand services. These could include dynamic routing and scheduling based on passenger demand, leveraging technologies such as mobile apps and real-time tracking to optimise efficiency and reduce costs.

Develop Unified, Interoperable Ticketing Systems
A nationwide push for unified ticketing is essential to streamline travel and reduce barriers for passengers. Contactless, multimodal solutions—such as a single smart card or app usable across buses, trains, and trams—can simplify journeys and encourage greater uptake of public transport. Lessons can be drawn from successful implementations such as London's Oyster card system.

Invest in Modernising Infrastructure
Upgrades to physical infrastructure, such as electrifying rail lines, modernising bus fleets, and refurbishing stations, can improve reliability, reduce emissions, and enhance passenger comfort. Prioritising accessibility, such as step-free access and improved signage, is crucial for inclusivity.

Foster Cross-Sector Collaboration
Collaboration between transport operators, local councils, and central government can create cohesive strategies for infrastructure development. Joint efforts in data-sharing, network planning, and project implementation can drive efficiency and ensure investments are aligned with long-term goals.

4. Provider/Supplier Pain Points

Collaborating with Providers and Suppliers

Transport providers and their suppliers are under increasing pressure to adapt to shifting regulatory landscapes and growing sustainability demands. Government and local authority interventions—such as route control, fare regulation, and data-sharing requirements—are redefining traditional operating models. At the same time, there is a push for greener, more efficient fleets and service innovations that reduce environmental impact while enhancing passenger experience.

Building resilient and flexible supplier relationships is essential to meeting these challenges. Partnerships must align with local authority goals, support fleet electrification, and facilitate the adoption of technologies like eco-routing algorithms. Additionally, data-sharing frameworks and adaptive service models will play a pivotal role in securing future contracts and maintaining competitiveness.

Key Issues

Regulatory Shifts
Increasing control by governments and local authorities over routes, pricing, and data-sharing obligations creates significant operational challenges. Providers must navigate these regulations while balancing profitability and compliance. Localised initiatives—such as Manchester's franchised bus model—illustrate how authorities are taking greater control, requiring operators to adapt quickly.

Sustainability Demands
The need for more environmentally friendly transport solutions is intensifying. Expectations for fleet electrification, reduced emissions, and adherence to net-zero goals require significant upfront investment in infrastructure, vehicles, and training.

Cost Pressures
Rising fuel costs, inflation, and the cost of transitioning to greener technologies strain budgets for providers and suppliers. These financial pressures can make it difficult to offer competitive bids or invest in necessary innovations.

Fragmented Supply Chains
Complex and fragmented supply chains, particularly for parts, vehicles, and technology, can cause delays and operational inefficiencies. Coordination challenges often arise between providers, suppliers, and local authorities, further complicating service delivery.

Data Sharing and Security
Providers remain cautious about sharing route and passenger data due to competitive concerns and cybersecurity risks. Yet, transparent data-sharing is increasingly a requirement for collaboration with local authorities and other operators.

Recommendations

Align Supplier Partnerships with Local Goals
Providers should prioritise partnerships with suppliers that align with local authority sustainability objectives. This includes collaborating on projects for fleet electrification, renewable energy integration, and emissions reduction strategies.

Offer Flexible Service Models
Adaptive service models—such as demand-responsive transport or hybrid fixed/on-demand services—can help providers meet evolving passenger needs and secure long-term contracts. Flexibility in route planning and pricing structures will also enhance competitiveness.

Invest in Fleet Electrification and Eco-Routing Technologies
Providers must accelerate investments in electric and low-emission vehicles to meet regulatory demands and public expectations. Eco-routing algorithms, which optimise routes for fuel efficiency and reduced emissions, can deliver both environmental and cost-saving benefits.

Develop Comprehensive Data-Sharing Frameworks
Establishing secure, anonymised data-sharing systems is essential for collaboration with local authorities and other transport operators. These frameworks should protect competitive interests while enabling the exchange of valuable insights to improve network efficiency and passenger experience.

5. Digital Inclusion & Inclusivity

Promoting Digital Inclusion

Digital inclusion is essential for ensuring that public transport systems are accessible to all passengers, regardless of their technological proficiency or access to modern devices. Gaps in digital literacy and limited access to the latest technology can create significant barriers, excluding vulnerable groups from the benefits of modern transport services. To address these challenges, transport platforms must prioritise user-centric design, multilingual support, and backward compatibility with older devices.

Providing resources such as tutorials, user guides, and dedicated technical support can help onboard first-time users and build confidence in digital tools. Equally important is ensuring that digital services are supplemented by offline alternatives, such as physical tickets and printed schedules, to cater to passengers without regular internet access or smartphones.

Key Barriers

Digital Literacy Divide

Passengers have varying levels of comfort and familiarity with technology, with older adults and those from disadvantaged backgrounds often at a disadvantage.

Access Limitations

Many passengers lack access to high-speed internet or rely on older devices that may not support the latest apps and digital features.

Future Strategies

Design Intuitive, Multilingual Platforms

- Create apps and websites with clear, easy-to-use interfaces, ensuring they are accessible to passengers with limited technical skills.
- Support multiple languages to accommodate diverse passenger demographics and those with limited English proficiency.

Ensure Backward Compatibility

- Design digital tools that function effectively on older devices and require minimal system resources, enabling access for passengers with outdated technology.

Provide Tutorials and Dedicated Support

- Offer step-by-step tutorials, FAQs, and how-to videos for first-time users to help them navigate digital tools confidently.
- Establish dedicated technical support channels, including in-person assistance at stations or via helplines, to address user queries and issues.

Promote Digital Literacy Initiatives

- Partner with community organisations and local councils to run workshops and campaigns aimed at improving digital literacy among passengers.

Maintain Offline Alternatives

- While prioritising digital services, ensure that physical tickets, printed timetables, and customer service desks remain available for passengers who cannot or prefer not to use digital platforms.

6. Sustainability Value Adds

Advancing Sustainability Initiatives

Sustainability has moved from being an optional consideration to a core imperative for public transport providers. With growing regulatory requirements, public expectations, and the urgency of addressing climate change, transport operators must prioritise sustainable practices. This includes reducing emissions, optimising energy use, and encouraging passengers to make environmentally conscious travel decisions.

By promoting green routes, accelerating fleet electrification, and leveraging behavioural nudges, operators can reduce their carbon footprint and contribute to national and global sustainability targets. These efforts also align with passenger expectations for environmentally friendly services and support compliance with stringent government regulations.

Emerging Practices

Promoting Green Routes
Transport operators can prioritise routes that optimise fuel efficiency and reduce emissions. This includes deploying carbon-efficient buses on high-demand routes, utilising eco-routing algorithms, and incorporating low-emission zones in urban centres.

Fleet Electrification
Expanding electric and low-emission vehicle fleets is a cornerstone of sustainable transport. Operators should also consider hybrid technologies and renewable energy solutions, such as hydrogen-powered vehicles, for longer-distance services. Infrastructure upgrades, like charging stations at depots and major transport hubs, are critical to supporting this transition.

Behavioural Nudges
Personalised prompts and notifications can play a significant role in influencing passenger behaviour. For example:

- Encouraging walking or cycling for short distances during favourable weather.
- Promoting public transport options over private car use through real-time travel time and cost comparisons.
- Highlighting the environmental benefits of specific routes or vehicles (e.g., "Your journey on this electric bus has saved X kg of CO_2").

Benefits of Sustainability in Public Transport

By embedding sustainability into operations, public transport providers can achieve:

- **Regulatory Compliance**: Meeting government mandates for emissions reduction and net-zero targets.
- **Cost Efficiency**: Lower fuel costs and operational savings from energy-efficient vehicles and infrastructure.
- **Enhanced Passenger Experience**: Attracting environmentally conscious travellers who value green alternatives.
- **Long-Term Resilience**: Future-proofing operations against fluctuating energy prices and stricter environmental policies.

7. Industry Trends & Themes for 2025

Looking Ahead: Industry Trends for 2025

As we approach 2025, the UK's public transport landscape is evolving to meet rising passenger expectations, environmental goals, and technological advancements. The future points toward an integrated and customer-centric public transport ecosystem, with local authorities playing a pivotal role in unifying services across operators. Innovations such as dynamic pricing, data-driven decision-making, and enhanced transparency will redefine how passengers interact with and perceive public transport systems.

Major Trends

Integrated Public Transport Ecosystems

- Local authority-managed systems, such as those being implemented in Greater Manchester, will lead the way in creating seamless cross-operator travel experiences.
- Unified ticketing systems will allow passengers to travel across buses, trains, and trams using a single payment method, making journeys more convenient and reducing barriers to entry.
- Shared operational standards across transport modes will enhance coordination, reliability, and efficiency.

Dynamic Pricing Models

- Fare caps will ensure passengers never pay more than a pre-set daily or weekly limit, increasing affordability and encouraging frequent use.
- Flash sales and promotional pricing will attract new users during off-peak hours or specific periods, helping operators balance demand.
- Auto-upgrades to multi-trip passes or season tickets will reward loyal passengers with cost savings while simplifying fare structures.

Data-Driven Services

- Real-time analytics will optimise routes, reduce delays, and adjust schedules to meet demand dynamically.
- Personalised travel notifications will provide passengers with tailored information, such as recommended travel times, route suggestions, or disruption alerts.
- Predictive maintenance enabled by data insights will improve vehicle reliability and minimise service disruptions.

Service Transparency

- Live bus and train tracking, integrated with user-friendly apps, will offer passengers up-to-the-minute information on vehicle locations and estimated arrival times.
- Real-time journey updates, including delays or alternative route suggestions, will boost rider confidence and satisfaction.
- Transparent reporting on service performance and environmental impact will help operators build trust and align with public and regulatory expectations.

Technological Advancements

- AI and machine learning will play a greater role in predicting passenger demand, improving traffic flow, and personalising travel experiences.
- Smart infrastructure, such as automated ticket barriers and AI-driven scheduling systems, will streamline operations and enhance efficiency.

8. Areas to Avoid

Common Pitfalls

Public transport providers must be cautious of recurring industry missteps. Overcomplicated fare systems, fragmented apps, and inconsistent service standards risk undermining customer trust. Sustainability claims must be backed by real environmental impact to avoid greenwashing accusations. By addressing these pitfalls proactively, operators can build a more reliable, accessible, and environmentally responsible network that truly meets the needs of passengers and stakeholders.

Mitigating Pitfalls

Simplify Fare Structures

- Create unified and transparent fare systems that integrate across operators and modes of transport. Implement user-friendly tools to calculate fares and communicate pricing clearly.

Streamline Digital Offerings

- Develop multifunctional apps or integrated digital platforms that handle ticketing, journey planning, and customer support in a seamless way.

Commit to Authentic Sustainability

- Focus on initiatives with measurable environmental benefits, such as fleet electrification or renewable energy projects, and back claims with transparent reporting.

Standardise Training and Services

- Invest in comprehensive staff training programmes and implement consistent service standards to ensure a reliable and inclusive passenger experience.

Maintain Accessibility for All Users

- Ensure offline options remain available alongside digital tools to cater to all passengers, including those who are less tech-savvy.

Foster Collaboration

- Work with local authorities and other operators to create a cohesive transport network that prioritises passenger convenience and accessibility.

Actively Respond to Feedback

- Establish dynamic feedback systems that capture passenger sentiment in real time and implement actionable changes based on this input.

Summary & Predictions

Based on our analysis, we predict that advances in multi-provider integration, improved customer-centric design solutions and sustainability-focused operations will shape the Customer Experience of public transport in 2025.

The widespread adoption of real-time analytics will enable transport operators to optimise routes dynamically, anticipate passenger demand, and provide personalised journey updates. Unified ticketing systems across multiple modes and operators will simplify travel, with digital platforms offering seamless, user-friendly experiences to enhance customer satisfaction and rebuild passenger confidence.

Sustainability will remain a driving force, with innovations such as fleet electrification, eco-routing algorithms, and renewable energy integration transforming operations. AI and machine learning will play a pivotal role in improving service efficiency, from predictive maintenance to adaptive scheduling.

Ensuring digital inclusion and accessibility will remain a priority as public transport providers work to rebuild passenger numbers post-pandemic and future-proof their services.

Together, these trends will shape a more efficient, inclusive, and environmentally sustainable public transport system.

Contact us to discuss how we can work together to support your digital improvement journey.