



**Sharpness Vale – Mobility-as-a-Service and Express Coach Services**

Non-car Movement Strategy, Viability & Funding Appraisal

March 30, 2021

Prepared for:

Sharpness Development LLP

Prepared by:

Stantec UK Ltd



<b>Revision</b>	<b>Description</b>	<b>Author</b>		<b>Quality Check</b>		<b>Independent Review</b>	
Issue	First issue	█	03-21				



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

This document entitled Sharpness Vale – Mobility-as-a-Service and Express Coach Services was prepared by Stantec Limited (“Stantec”) for the account of Sharpness Development LLP (the “Client”). Any reliance on this document by any third party is strictly prohibited. The material in it reflects Stantec’s professional judgment in light of the scope, schedule and other limitations stated in the document and in the contract between Stantec and the Client. The opinions in the document are based on conditions and information existing at the time the document was published and do not take into account any subsequent changes. In preparing the document, Stantec did not verify information supplied to it by others. Any use which a third party makes of this document is the responsibility of such third party. Such third party agrees that Stantec shall not be responsible for costs or damages of any kind, if any, suffered by it or any other third party as a result of decisions made or actions taken based on this document.

Prepared by

[REDACTED]

[REDACTED]



## Table of Contents

<b>1.0</b>	<b>INTRODUCTION &amp; CONTEXT</b> .....	<b>1.1</b>
1.1	SITE LOCATION .....	1.2
<b>2.0</b>	<b>ACCESSING SUSTAINABLE MODES – “MOBILITY AS A SERVICE”</b> .....	<b>2.3</b>
2.1	LOOKING TO THE FUTURE.....	2.3
2.1.1	Development of MaaS.....	2.4
2.2	MAAS AT SHARPNESS.....	2.5
2.2.1	System Benefits .....	2.6
2.2.2	Travel planning with MaaS .....	2.6
2.2.3	Payment methods .....	2.7
2.2.4	The MaaS “umbrella” .....	2.7
2.3	INTERACTION WITH PROVIDERS .....	2.10
<b>3.0</b>	<b>EXPRESS COACH SERVICES</b> .....	<b>3.11</b>
3.1	FLEXIBLE SERVICE DELIVERY.....	3.11
3.1.1	Creating a model.....	3.12
<b>4.0</b>	<b>SUMMARY OF TRIP DEMAND</b> .....	<b>4.14</b>
4.1.1	Person Trip Distribution Summary.....	4.14
4.1.2	Mode Share .....	4.15
<b>5.0</b>	<b>BESPOKE COACH STRATEGY</b> .....	<b>5.17</b>
5.1.1	Service configuration.....	5.17
5.1.2	Destinations .....	5.17
5.1.3	Coach versus Rail .....	5.18
5.1.4	Trajectory .....	5.18
5.1.5	Designing the services .....	5.19
5.1.6	Funding.....	5.20
<b>6.0</b>	<b>EXPRESS COACH SERVICE APPRAISAL</b> .....	<b>6.24</b>
6.1.1	Spreadsheet models .....	6.24
6.1.2	2,400 home model .....	6.24
6.1.3	5,000 home model .....	6.25
<b>LIST OF APPENDICES</b>		
<b>APPENDIX A</b>	<b>SPREADSHEET MODEL</b> .....	<b>6.1</b>
<b>APPENDIX B</b>	<b>ZEELO COMMERCIAL PROPOSITION</b> .....	<b>6.5</b>



### 1.0 INTRODUCTION & CONTEXT

Sharpness Development LLP are the promoters of the proposed Sharpness Vale settlement, following garden village principles, at land south and east of Newtown and Sharpness, in the district of Stroud, Gloucestershire.

The site, referenced in this appraisal report as 'Sharpness Vale' is identified as a growth point in the draft Stroud District Local Plan Review Draft Plan for Consultation (November 2019) as a proposed allocation under site reference 'PS36' for a new garden community comprising:

1. 10ha mixed employment uses, to complement what already exists at and around Sharpness Docks;
2. 2,400 dwellings in the Local Plan period, by 2040, and a total of 5,000 by 2050;
3. Local centre including shops and community uses, primary school(s) and secondary school, associated community and open space uses;
4. Strategic green infrastructure and landscaping;
5. Priority for walking, cycling, "micro-mobility" modes and public transport over the use of the private car including high quality pedestrian, cycle and micro-mobility routes throughout the development, bus only routes and displaced car parking;
6. The reopening of the Sharpness Branch line to passenger services, in addition to the current freight operations, including provision of a new rail station, providing direct rail services to Cam and Gloucester, and onwards journeys to Bristol and the rest of the UK; and
7. Flexible and targeted bus services, utilising "Demand Responsive" services, traditional local bus routes, bespoke coach services and other emerging technologies to provide for a wide range of different journey purposes.

The aim of Sharpness Vale is to create an exemplar, high-quality and sustainable network of new neighbourhoods that people will aspire to live and invest in with a real 'sense of place.' The intention is for the neighbourhoods to grow organically in the future in a logical and sustainable manner, benefiting from the new infrastructure created by the initial development. In terms of transport and movement, Sharpness Vale is developing a wholly sustainably focused strategy for Access and Movement. The philosophical approach to this is two-fold:

1. Looking to the future, at emerging trends and changes in behaviour, technology and attitudes to create a place that is resilient to changes like necessary climate change responses, and;
2. Planning positively for people to use sustainable modes, and hence making positive provision for the outcomes that we want to see and deliver, rather than making reactionary provision based out of concerns that behaviour won't change.

As a result, we have developed a vision for movement at Sharpness Vale that picks up on the latest trends. This includes the re-opening of railways which has been part of emerging Government policy



# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

## Introduction & Context

(reference Restoring your Railway Fund, and the Future of Transport regulatory review consultation which is on-going), and which we have been gratified to see follows the principles that we have outlined for Sharpness for some time.

The proposals also recognise that the restoration of the railway will only deal with some trips, and that alternative sustainable transport provision will be required to deal with the wide range of possible trips that people will need to make to and from the development.

This document examines the way that movement can be catered for at Sharpness Vale, and specifically sets out the way that “Mobility as a Service: provision across the development and the local area will create an umbrella for residents and local businesses to access the full range of sustainable transport modes. It goes on to consider how the tiers of sustainable transport will be provided for, and details the way that express coach services will provide for journeys in a tailored way.

## 1.1 SITE LOCATION

The site lies to the south of Gloucester, and west of the strategic M5 and A38 corridors in the district of Stroud, and its location is identified in red on the plan below:

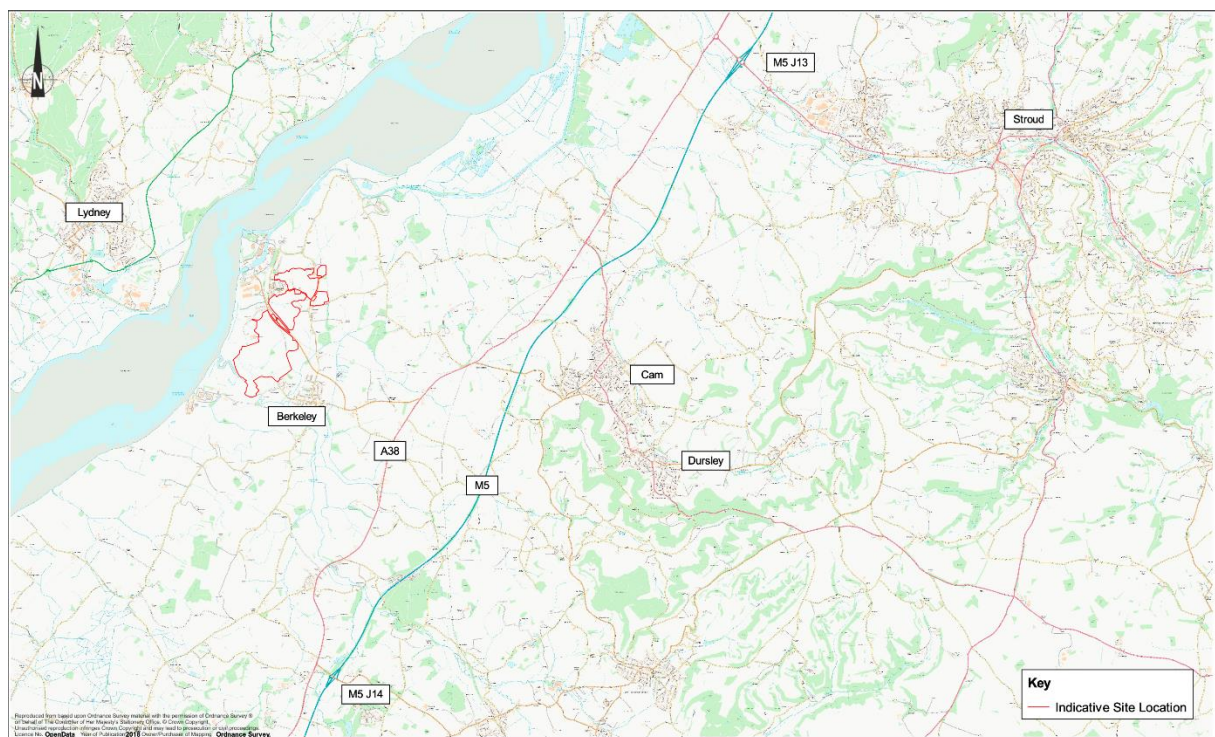


Figure 1 - Contextual Site Location



## 2.0 ACCESSING SUSTAINABLE MODES – “MOBILITY AS A SERVICE”

The concept of “MaaS” has gained ground over recent years, as there has been recognition that online accessible transport services – such as Uber and Lyft, have opened up the market to users to access transport services on a bespoke basis at short notice. These systems are not founded on infrastructure investment or provision, but instead are “virtual” infrastructure systems that match users to providers.

They wrangle data using dedicated algorithms to provide a seamless service to users. This business model is fundamentally different – and arguably are the opposite of the traditional transport business models.

The traditional public transport model was about providing a dedicated service between points of high demand to a set timetable. This model remains both workable and efficient in the context of high volumes of movement demand between defined points – such as between suburbs and city centres. But the ability of this model to service more disparate travel demands has eroded over time. In the immediate post-war period, when car ownership was low, local bus services were used in many towns and villages, as they were the only service available. Users would configure their travel demands around the timetables and availability of services.

However, as car ownership grew, the ridership of these services declined, as the car provided a cost effective means of travel without any particular limitations on time of movement or destination. Over time, car ownership became so ubiquitous that it was seen by many as a necessity, to the extent that the perception of the costs of using a car on a per journey basis is often only considered in the context of the marginal costs of fuel, parking and so on.

This squeeze on the viability of local bus services meant that many ceased to operate, without subsidy, or they had to seek consolidation of routes to the detriment of passenger journey times and convenience. This was, essentially, a response that was trying to group riders together as far as possible to maintain the viability of the timetable based, fixed pattern service.

### 2.1 LOOKING TO THE FUTURE

The trends in changing travel behaviour in the 21<sup>st</sup> Century have been evident for some time – fewer young people are learning to drive, or planning to own a car, the online providers are growing their market share and new, often “personal” modes of transport are emerging into the mainstream now. People were also varying their working practices more, with home working and flexible hours becoming more significant as discernible trends. The introduction of “family friendly” working policies by many employers is changing the traditional “9 to 5” commuting pattern that had prevailed since the second world war.

These trends have all been accelerated by the recent Covid 19 pandemic. This has forced employers to find ways for people to work from home, and it is clear that many of these changes will now be sustained.

As a result, it is likely that travel provision – especially for new growth points like the one proposed at



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Accessing Sustainable Modes – “Mobility as a Service”

Sharpness Vale, will need to change:

- A more flexible, and sophisticated approach to transport will need to be developed, that is able to respond in real time to the needs of residents, businesses and visitors
- A tiered approach to provision will be needed, that provides a range of responses to tackle individual travel needs
- The service provision will necessarily need to be adaptable, with changes to routes, destinations, vehicle types and timings being able to be completed quickly and effectively to meet users’ needs
- The way that users interact with the service should allow them to access the most efficient means of making their journey – whether this is determined by cost, time or any other factors that the user specifies
- And most significantly – ACCESS to the transport services will need to be user-focussed, delivering journey planning in real-time to individual demands, and responding to differing travel needs by individuals on a day-to-day basis

All of this means that establishing MaaS across Sharpness Vale – and the existing developments close to it, is likely to offer the best comprehensive mechanism for people to access a range of travel information and services easily.

#### 2.1.1 Development of MaaS

In 1996, the concept of an "intelligent information assistant" integrating different travel and tourism services was introduced at the ENTER E-tourism conference. Following that, a concept trial was conducted very successfully in Gothenburg, Sweden using a monthly subscription model to access transit services. The service was well received, and won considerable user support, but it was ultimately discontinued due to lack of support at the government level for third party on-selling of public transport tickets at that time.

The story went quiet then, until the idea of a digitally connected seamless multi-modal transportation network was discussed at a technology conference in California in mid-2012. This was geared around the opportunities that might be created by the rapidly increasing popularity of smart-phones.

The proposal was that this would become so ubiquitous and seamless that mobility could be "backgrounded" in the urban fabric similar to other essential utilities or services. The “travel” accessibility of the smart phone would come to be seen as a day-to-day reality, like using your smart phone for texting, calls or taking photos.

Next to take up the idea was Sampo Hietanen, CEO of ITS Finland , who founded Maas Global, and Sonja Heikkila, then a Masters student at Aalto University, with the support of the Finnish Ministry of Transport and Communication. In 2017 their efforts resulted in the launch of the “Whim” MaaS application, the first all-inclusive solution commercially available on the market, and rolled out as a subscription service in Helsinki. Later, in 2018, Finland amended its law to introduce the “Act on Transport Services” that established a legal framework for the promotion of innovative sustainable transport services.





## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Accessing Sustainable Modes – “Mobility as a Service”

In September 2019, Berlin's public transport authority Berliner Verkehrsbetriebe (BVG) advanced Mobility as a Service development by launching the first large-scale and city owned project – known as "Jelbi", at about the same time as the Lithuanian mobility startup Trafi also rolled out.

Meanwhile, Maas Global's Whim application was recognized in national and international awards. International expansion started when Whim was launched in Birmingham, UK in Spring 2017 and in Antwerp, Belgium later that same year.

Maas Global remains the market leader – although other similar providers have started up since – SkedGo, Kyyti and others. There is also a Maas Alliance of industry leaders and interested companies and governmental authorities that is working together to enhance the development of MaaS in Europe. (<https://maas-alliance.eu>)

Most recently – and building on work undertaken by Stantec and its predecessors over many years, Kent County Council announced that it was planning to introduce MaaS as part of the transport network for Ebbsfleet Garden City in Kent. They published a notice that they were seeking suitable partners to develop the service, building on the “Fastrack” bus-based MRT system.

## 2.2 MAAS AT SHARPNESS

The Mobility-as-a-Service (MaaS) scheme that would be adopted at Sharpness Vale would be likely to partner with one of the established providers that are already operating similar services in the UK and Europe. There are a number of operators who could provide this service – MaaS Global, who operate the Whim MaaS service in Birmingham, would be a good example of the type of operator who would be suitable, but others exist. At present, the Sharpness Vale promoters have not formed a partnership with a MaaS operator, as it would make sense to do this once the commencement of development is closer, as the market is rapidly expanding and changing as new players and services are launched.

However, in principle, the operator would provide a single digital channel that enables users to plan, book, and pay for multiple types of mobility services. In simple terms, the operator acts as the mediator between multiple transport operators and the individual user. This means that they can access all of these modes to plan and make journeys without the need for multiple apps, or even wide knowledge of the services that are available,

The digital channel would allow the use of combinations of different services for a single journey (for example, a bus trip to the station combined with catching a train to Gloucester), but can also enhance journey planning from day to day to respond to real-time circumstances – for example, suggesting getting a coach to Gloucester instead of the train if there is an incident that has delayed the train.

The MaaS network would be expected to include all forms of public transport that were available, and most systems also offer a connection to a car hire source, so that even private cars are available on occasion when this is the most sensible mode to use – for example, going on holiday or collecting bulky goods.

Users would generally sign up to a monthly subscription for the service, with different levels of subscription to match their particular needs – for example, a non-driver may want a subscription that excludes the car rental option (as this is probably a more expensive addition, which they would never



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Accessing Sustainable Modes – “Mobility as a Service”

use). Other subscriptions would allow for regular commuting use by one mode, with access to others, or just for occasional use and so on.

The core concept behind MaaS is to offer users dynamic mobility options based on their travel needs. Most of the well-known urban mobility applications (Uber, Lyft etc) are already allowing their services to be mapped into MaaS services.

MaaS could significantly increase the efficiency and utilisation of transit providers that contribute to the overall transit network in a region. The predictions were validated by the Ubigo trial in Gothenburg during which many private cars were deregistered for the duration of the trial, whilst ridership of the transit services increased. Overall the efficiency of the transport network as a whole was enhanced – i.e. more people travelled more effectively.

### 2.2.1 System Benefits

MaaS has many benefits that can improve ridership habits, transit network efficiency, and bring societal, well-being and environmental benefits as reliance on the private car is effectively diminished. Over time, it should decrease costs to the user, and allow the fine-tuning and development of flexible and user-focused transit systems and modes.

MaaS can also dovetail effectively with business travel – being both a planning tool, a record of activity undertaken and an effective way to give employees access to the widest range of travel modes and opportunities. It can bring efficiency to business travel overall.

By analysing data and costs attributed to "business mobility" (e.g. vehicle rental costs, fuel costs, parking charges, train ticket admin fees and even the time taken to book a journey) businesses can make informed decisions about travel policy, fleet management and expense claims.

### 2.2.2 Travel planning with MaaS

Travel planning typically begins in a journey planner – most commonly on a phone or tablet app, but also via web browser for planning from home or office. The trip planner would show the user all of the ways of getting from one destination to another by any viable combination of modes – which would include walking, cycling, and vehicle-based combinations. The user can then choose their preferred trip based on whatever is important to them - cost, time, and convenience.

At the moment of confirmation of the trip, any necessary tickets and bookings are made (e.g. calling a taxi, reserving a seat on a train or coach). This is all done by the app, as single action.

Booming demand for more personalised transport services has created the viable market space and momentum for MaaS. This is supported by any number of innovative new mobility service providers such as carpool and ridesharing companies, bicycle-sharing systems, scooter-sharing systems and carsharing services as well as on-demand "pop-up" bus services and vehicle hire programmes covering all types and sizes of vehicle.

Mobility-as-a-Service is expected to create the impetus for a decline in car ownership. This could be for households that recognise that they can do without a car – but, in the first instance, is more likely to be around two-car households that realise that they can make a significant saving by reducing to a single car.



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

Accessing Sustainable Modes – “Mobility as a Service”

### 2.2.3 Payment methods

The MaaS concept works best on the basis of a subscription service that uses a Direct Debit each month to pay for membership. The aim is to provide a fixed cost for users, which provides flexibility in the amount and type of travel that they can access – albeit that there may be limits on some subscription levels related to more expensive service provision. But this is ultimately for the user to decide what level of service they require. (There is a parallel here with mobile phone subscriptions and volumes of data allowed – and, in a similar way, with extra over costs of exceeding that allowance, and opportunities to gear up to higher subscription levels if this becomes a regular occurrence).

Most MaaS systems also allow occasional access and low level app membership with individual journeys paid for at time of booking.

The system is flexible, and can accommodate a range of access structures for users.

### 2.2.4 The MaaS “umbrella”

The plan for Sharpness Vale is to have a MaaS service operational from the outset of the development, and to make this accessible to residents and occupiers of the development, and to the existing communities in the surrounding area (on the basis that there is no common sense reason not to seek sustainability benefits wherever they can be derived).

The MaaS service is expected to provide access to a range of services, that together form the tiered and proportionate transport offer at Sharpness Vale – specifically:

- Rail tickets to Sharpness Branch Line services as soon as they are up and running
- Bookings for the “Zeelo” express coach services
- Tickets for the local bus services
- Booking with local taxi providers, Uber and other on-demand services
- Cycle hire facilities – probably provided by others on site, but available through MaaS
- Car pooling and rental

The way that this will work, and the different levels of subscription that are envisaged are shown on the diagram below:

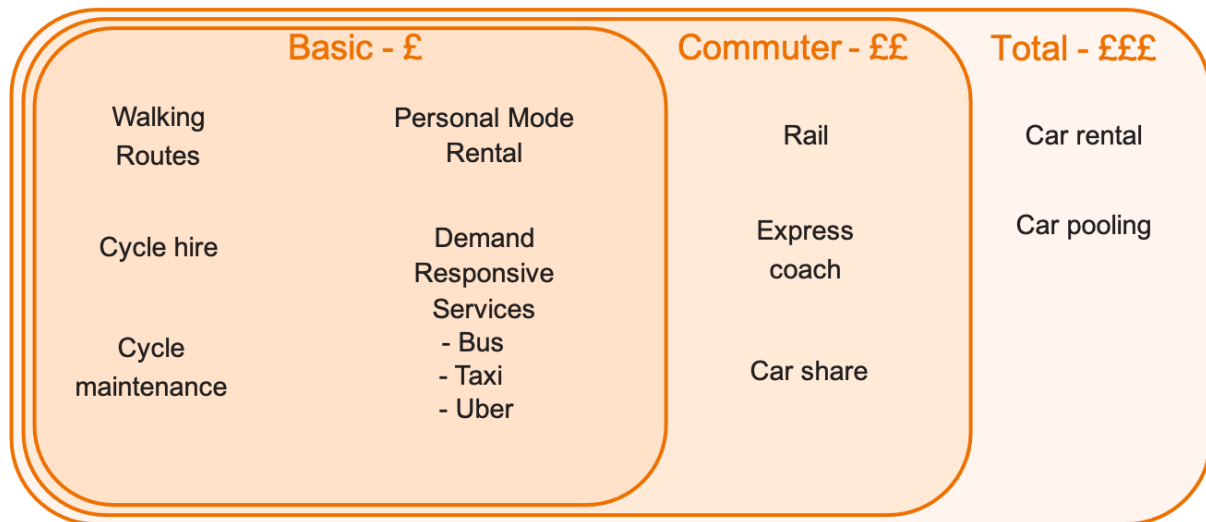


# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

Accessing Sustainable Modes – “Mobility as a Service”



## Subscription-based variable access



The beauty of MaaS is that it is flexible, and can be adapted to respond to particular needs and opportunities, but at present it is envisaged that there would be a three tier system of subscriptions.

The “Basic” subscription would give access to the journey and travel planning facilities of the app, and would provide access to local bus and taxi services, demand responsive travel and cycling and personal transport modes. The app would provide guidance and walking route advice as well. This level would be suitable for people who mainly spend time in and around the local area, and who have an occasional need to travel further afield. The membership would allow these members to book occasional rail and coach services, but these would be at an additional charge to the subscription that they paid.

The next level up, the “Commuter” subscription would build on the Basic services to add rail, express coach and car sharing as part of the subscription. The aim would be that this would provide travel to work where this was away from the site – and there may be sub-divisions of this subscription model to allow for changing work patterns – with more people working from home for more of the time, and hence not necessarily commuting every day, or travelling to a wider range of destinations.

Finally, the “Total” subscription would give access to the most expensive modes – car rental and car-pooling, along with all the other services.

The subscription costs would need to be fixed nearer to the time of launch, and related to the costs of service delivery and agreements struck with individual travel providers. At present the Whim service in Birmingham doesn’t operate on a subscription basis, but allows travel planning and booking across a range of services with a single billing entity.

The “Whim” subscriptions in Helsinki are a better example, and are currently structured as follows:



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

Accessing Sustainable Modes – “Mobility as a Service”

	Whim Urban	Whim Student	Whim Weekend	Whim Unlimited
Cost per month:	€62.70 (£54.10)	€34.40 (£29.68)	€399 (£344.28)	€699 (£603.14)
Public transport	30 day ticket	30 day student pass	30 day ticket	Unlimited tickets
Bike hire	Included – up to 30mins per journey	Season pass for €24.90	Included – up to 30mins per journey	Included – up to 30mins per journey
Taxis	Discounted trips up to 3km	Pay as you go	15% discount on all trips	Included – 80 journeys in the City
Rental car	Available - €49 per day	Pay as you go	Included at weekends	Unlimited
E-scooter	Available – individually priced	Available – individually priced	Available – individually priced	Available – individually priced

It should be noted that this reflects both a fixed monthly cost, but also good value-for-money – an 18+ Student Oyster travel pass in London currently costs £58.80 per month, compared to under £30 per month with Whim in Helsinki.

A key aspect to MaaS is to consider who might use it, and how it fits in to the context of a new growth point. Experience elsewhere suggests that there are groups of people for whom MaaS works really well:

- Young people, who appreciate the flexibility and the freedom to travel as they wish
- Two-car families – can often use a MaaS subscription to switch to one car – which creates a saving for them, but without loss of accessibility
- Older people, who may work part-time, or not at all, and who can adopt a more local lifestyle, but with the ability to travel further afield when they need to
- Home-workers – who can take advantage of not needing to pay for a little used car, but want to retain flexible travel
- Commuters – who can get season ticket style ease and convenience of use for work travel, but with flexibility of modes and coverage for other journeys too

Along with many others, of course.



## 2.3 INTERACTION WITH PROVIDERS

Ultimately it will be for the MaaS provider to coordinate and negotiate deals with individual providers – whether these are geared around a reimbursement of ticket price basis, or on a different lump sum or similar arrangement. However, it is expected that the local public transport operators – rail, taxi and bus, in particular, would be available through the scheme. Demand Responsive travel providers, such as Uber and Lyft, already have connections with MaaS operators, and so should be available through the MaaS system.

The provision of cycle and personal transport modes may be through a link to a cycle hub operator within the Sharpness Vale development, or may be something that the MaaS operator would undertake.

Access to car rental and car-pooling (car clubs) would generally be through an arrangement with a rental company or operator who would base cars within the development to make them easily accessible.

The delivery of express coach services at Sharpness is a core plank of the low energy transport network that we are aiming to provide. The next section of this document examines this service, and how it would be provided. It would operate through an independent provider – in a similar way to the other public transport services, and so would be accessible to users either directly or under the MaaS umbrella.



## 3.0 EXPRESS COACH SERVICES

The delivery of express coach services is configured around a partnership with a suitable operator, who will provide services to and from Sharpness on a flexible basis, matched to demand and key destinations as these develop over time. The intention is that this provides a further layer of public transport provision, allowing direct services to key destinations from Sharpness. They would be configured to rival car journey times between these destinations, and to be priced on a daily basis to compete with marginal car usage prices – fuel and parking.

The Sharpness Vale promoters have decided to form a relationship with an operator called “Zeelo” at the present time, to develop a specific and tailored strategic coach and bus response to support the Sharpness Vale development. Zeelo has developed a costed proposal for Sharpness Vale – and this is included as an Appendix to this document.

The link to an experienced operator means that a financial appraisal can be developed at this early stage to demonstrate how the service would be expected to operate.

### 3.1 FLEXIBLE SERVICE DELIVERY

The provision of bus services is inherently flexible, as they are relatively easily procured and changed. The plan for the express coach services is that they would provide a high quality, tailored service that would get people where they need to go in a way that competes directly with the private car.

By targeting the key destinations, there will be enough patronage to operate a dedicated service from Sharpness to that destination, and back again, without the distraction of having to serve numerous other locations along the way – which significantly increases the journey time, and reduces the convenience of the users when compared with using the car.

However – a bespoke service (so long as it can be shown to be viable for the number of users that want to use it) can have some significant advantages, even over the car:

- Reduces user liability – the user has no risk or responsibility for the maintenance or reliability of the vehicle
- Releases time back to users – time on the journey can be recovered to spend on tasks other than driving – reading, working, private study, relaxation, etc
- Reduces stress levels – the act of driving requires concentration, leaving the user with greater stress at either end of the journey, compared to having spent the journey with choices about what they do
- Can be cheaper – in a “whole of journey” comparison – i.e. the total cost of car ownership, fuel, parking, running costs can be higher than for the coach seat – and carries a genuine risk of the unexpected
- Can be built into a subscription travel service – “MaaS”, to save users money. The sunk cost of car ownership can be avoided, with subscription to the travel service that will operate across Sharpness Vale, and give access to the express coach services on both a regular and



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Express Coach Services

occasional basis. The ability to only pay for the travel that is actually used provides better value for money, and avoids the capital outlay of car ownership

- No storage issues - the user doesn't have to tackle the issue of where the vehicle is stored (parked) when they aren't using it
- Enhances "green" travel – and for users can be part of a lower carbon lifestyle
- Increased accessibility – the coach doesn't require the user to have a driving licence – younger people are showing a lower propensity to learning to drive in any event
- With Zeelo, there are additional benefits as they would provide coordinated marketing, promotion and accessibility information for the services, that provide the widest range of access so that everyone would be able to see how to book seats, see where buses were in real time, and so on. They would also offer periodic promotions, discounts and other incentives to boost the service, which would be added value benefits that would not be available to a car driver.

It should also be noted that neither the services themselves nor the MaaS subscription services will be limited to residents of the development. The greater the potential catchment for these facilities the better, and so the existing communities in the area will be able to access them from their inception as well.

As with every other mode (including the private car) the express coach mode isn't the right solution for every journey – no mode is a panacea for everything, but it is a viable and sensible element of the overall low carbon / less car reliant travel strategy for Sharpness. Indeed, there are a range of core locations where there will be sufficient travel to warrant operating a service of this nature.

#### 3.1.1 Creating a model

It should be remembered that the basis of the express coach services are that they are designed to meet the demands that exist at the time. There will be a significant promotion and advertising of the availability of services, and Zeelo has resources and systems in place to promote and advance the services over time. But they would operate with vehicles sized to meet the demand, at times that maximised user convenience to destinations where there was a demand to go.

Consequently, the application of these services will be developed in "real time" to meet demands.

This means that, if, in the early stages of development, there was a demand for a service to Stroud, or to Bristol, but little demand to Gloucester, for example, then the services would be configured to match this demand, and to promote and grow it over time. Services could start with small vehicles – even people carriers, before expanding to 16 seater buses, then 33 seaters, and potentially to full size coaches of 53 seats, or double-deckers that could seat 78 per trip.

However, for the purposes of demonstrating how the service would operate, it makes sense to develop a costing model that sets out the costs and income that would allow the system to serve the development. There will be a need to pump-prime the service at the outset, and this investment could come from the developer, typically, or may be shared with the operator or another party leveraged against future earnings.





## **SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES**

### Express Coach Services

Therefore, this appraisal is accompanied by a theoretical model that shows how the express coach services would be expected to develop over time, from an initial service to Bristol and Stroud when there were about 50 home occupations, to a comprehensive service to a range of employment locations towards, and including Bristol, to Gloucester and to Stroud at the completion of the Local Plan allocation.

The assessment starts with a consideration of the potential patronage for these services, based on the work previously completed as part of the Transport Technical Appraisal – June 2020, and repeated in the following section for ease of reference.



Summary of Trip Demand

## 4.0 SUMMARY OF TRIP DEMAND

The Sharpness Vale Transport Technical Appraisal provides a detailed assessment of the peak period trip demand forecast for the fully complete development of 5,000 homes, 10HA of commercial and employment land uses and other supporting and core uses associated with the development (schools, shopping and so on). This assessment analysed the range of potential trip purposes and travel modes that could be expected to be used.

This assessment is detailed below, for ease of reference, but full details of the derivation of these trips is contained in the Transport Technical Appraisal.

### 4.1.1 Person Trip Distribution Summary

The person trip distribution for each journey purpose for the morning and evening peak hours respectively is shown in the tables below:

**Table 1 - Morning Peak Hour Distribution**

Destination	Residential				Employment	Total
	Work	School	Shopping and PB	Leisure		
Cam/ Dursley	136	159	144	35	123	598
Bristol	238		36	29	26	329
South	452		72	24	89	637
Gloucester	322		72	20	56	470
Stroud/ Stonehouse	191		36	12	68	307
Cheltenham	54			11	9	74
Tewkesbury	62			3	11	76
Wotton Under Edge	87	159		15	28	289
Frampton on Severn	68			4	18	91
Total	1,610	319	360	154	428	2,871



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Summary of Trip Demand

**Table 3.2 - Evening Peak Hour Distribution**

Destination	Residential				Employment	Total
	Work	School	Shopping and PB	Leisure		
Cam/ Dursley	104	39	173	140	97	553
Bristol	183		43	115	20	361
South	347		87	95	70	598
Gloucester	247		87	80	44	457
Stroud/ Stonehouse	146		43	49	53	292
Cheltenham	41			44	7	92
Tewkesbury	47			10	9	66
Wotton Under Edge	67	39		59	22	186
Frampton on Severn	52			16	15	83
Total	1,234	77	433	608	336	2,689

#### 4.1.2 Mode Share

The appraisal methodology utilised census and available pricing data to consider the relative costs of potential trips from Sharpness Vale. Typical journey times for the different modes were also extracted from publicly available data – internet sources for car-based journey times and timetable information to derive public transport journey times. This resulted in the following assessment of trips from the development in terms of the destination related to Sharpness and the proportion of trips that would arise to each travel mode:



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Summary of Trip Demand

**Table 3.3 - Morning and Evening Peak Trips by Destination and Mode**

Destination	Average % Distribution	Morning Peak (8am to 9am)					Evening Peak (5pm to 6pm)				
		Car Driver	Car Passenger	Bus/ Coach	Train	Total	Car Driver	Car Passenger	Bus/ Coach	Train	Total
Cam/ Dursley	21%	129	92	377		598	122	86	345	0	553
Bristol	13%	46	27	223	36	332	59	41	226	48	373
South Gloucestershire	22%	127	70	377	64	637	121	73	344	60	598
Gloucester	17%	87	50		333	470	88	56	0	314	457
Stroud/ Stonehouse	11%	32	19	256		307	37	25	230		292
Cheltenham	3%	16	9		49	74	20	13		59	92
Tewkesbury	3%	22	11		42	76	19	10		37	66
Wotton Under Edge	9%	67	49	174		289	45	30	111		186
Frampton on Severn	3%	18	9	63		91	17	9	56		83
<b>Total</b>	<b>100%</b>	<b>543</b>	<b>336</b>	<b>1,471</b>	<b>524</b>	<b>2,874</b>	<b>527</b>	<b>343</b>	<b>1,313</b>	<b>517</b>	<b>2,700</b>
<b>All Purpose Mode Share</b>		<b>19%</b>	<b>12%</b>	<b>51%</b>	<b>18%</b>		<b>20%</b>	<b>13%</b>	<b>49%</b>	<b>19%</b>	



## 5.0 BESPOKE COACH STRATEGY

These trip calculations have then been used in the assessment model for the provision of bespoke coach services.

### 5.1.1 Service configuration

These services would be configured as an “upper tier” level of public transport provision – hence, like the train, they provide direct services to locations that a significant number of people may want to travel to at similar times of the day. Whereas a traditional local bus service will seek to connect as many places as possible, often taking a circuitous route to meet that need, these bespoke services will favour a model where they operate as direct as possible between two points.

As a result, these services would only have one, or maybe two, key pick-up and drop-off locations in the Sharpness Vale development – certainly around the proposed railway station area, as a convenient hub for travel to which all of the development footpaths and cycle / personal transport routes will converge, and potentially at a further location in the north of the development area in the future.

The aim is that passengers are not disadvantaged by having to sit on a service that goes around numerous pick-up points before departing for the destination – instead, like a train service, it will focus around a key pick-up that passengers meet at, and then run as quickly and directly as possible to the destination. The same model will be used at the destination end of the journey – with a limited number of drop off / pick up stops at the destination end – whether in a City or business park.

This model allows the coach service to rival the private car journey in terms of speed and reliability, but gives advantages over and above that. Riders regain this time to spend as they wish, rather than driving, and they can take advantage of the wi-fi on the coaches and other facilities. They also remove the need to find and pay for parking at their destination.

One key disadvantage of the coach service can be if a rider misses the coach on the journey to or from work – perhaps because of something planned, like a dental appointment or late meeting, or due to some unforeseen circumstance like oversleeping or a late running event at work. This can be a problem for public transport commuting – especially where it is a bespoke service. However, the Sharpness Vale model has this base covered, as the ability to enfold the coach services, along with other transport services, into the MaaS model means that even riders that miss their coach service (or train service, as the same applies) will be able to access other demand responsive services (taxi, Uber etc) in order to complete their journey.

This combination of services under the control of one app and subscription base provides users with an easy and reliable means of travelling without needing to rely on the car.

### 5.1.2 Destinations

The trip assessment highlights locations where bespoke coach travel is likely to offer a convenient and realistic method of travel for most residents at Sharpness to these key places:

- Bristol – city centre



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Bespoke Coach Strategy

- Aztec West business park
- MoD
- University of West England
- Airbus / Filton
- Rolls Royce
- Gloucester – city centre until the train operation begins, and then potentially to other city locations away from Gloucester station
- Oldends Industrial Estate
- Stroud

Each of these locations is forecast to have a sufficient number of trips when the development is complete to facilitate the bespoke type of provision. They have been allocated a postcode as a proxy destination for the purposes of developing the outline business case (with the Sharpness Vale postcode designated as GL13 9NG for this purpose). The postcodes used and the number of trips envisaged on the basis of the Local Plan allocation of 2,400 homes is as follows:

	Bristol	Aztec West	MoD	UWE	Airbus	Rolls Royce	Glou'ter	Oldends Ind. Est.	Stroud
Postcode	BS1 6BD	BS32 4AW	BS34 8JH	BS16 1QD	BS34 7PA	BS34 7QE	GL1 1SZ	GL10 3RQ	GL5 3BD
2400 homes	165	60	93	46	53	46	0	112	112

### 5.1.3 Coach versus Rail

It should be noted that, by the completion of the Local Plan allocation it is assumed that at least one train per hour would be running to Gloucester, and so an allowance has been made in the modelling for an initial tranche of trips that would use the bespoke coach service to switched later to the train. The inherent flexibility of the coach service is evident here, as it can be used to provide the early service, before the train is operational, but can then be flexed back as the train takes over – those same coaches being re-deployed to the growing Bristol and Stroud services, perhaps,

### 5.1.4 Trajectory

The bespoke coach model follows the stages of development outlined in the Local Plan, assuming a development start in 2026/27, as follows:

Year	Homes	
4	2031	650
8	2036	1,600
12	2040	2,400

Although the model represents the build out rate that is indicated in the Local Plan trajectory in reality, the bespoke coach business case is neutral to the timescale. The service patterns modelled relate to a given volume of development, and hence potential patronage, related to the number of homes occupied on the site whenever this may occur.



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Bespoke Coach Strategy

It is expected that a faster rate of development would be possible at Sharpness, with further areas of development in subsequent Local Plan reviews (related to the overall capacity of the growth point of up to 5,000 homes) also coming on stream before the 2040 end date for the current draft Local Plan. The effects of a faster build rate, or more housing at Sharpness, would simply mean that the initial seedcorn funding and pump-priming costs would be reduced, with a lower requirement to bridge the gap during the early phases of development. This does not impact on the viability of each stage as set out relative to the number of homes occupied.

Bringing the destinations and phasing of development together, it is possible to see how the patronage for the express coach services will develop over the life of the development:

Routes	Destinations										
	Bristol	Aztec West	MoD	UWE	Airbus	Rolls Royce	Gloucester	Oldends Ind. Est.	Stroud		
Postcode	BS1 6BD	BS32 4AW	BS34 8JH	BS16 1QD	BS34 7PA	BS34 7QE	GL1 1SZ	GL10 3RQ	GL5 3BD		
Year	Homes	Peak Hour Coach Trips									
4	2031	650	45	16	25	13	14	13	70	30	30
8	2036	1,600	110	40	62	31	35	31	0	74	74
12	2040	2,400	165	60	93	46	53	46	0	112	112

It should be noted that some of these destinations may necessarily need to be linked in the early stages, and that service patterns will develop in stages in the early years. It will be important to communicate with users about how the services are configured and how they will grow and improve over time. This approach can be successful, as pioneer users are content to experience a level of variability in the service as it establishes so long as they know that the service will improve over time and are kept informed as things develop.

Ultimately, of course, the numbers above are forecasts based on census data, and so the actual services will be adjusted to respond to actual demands – some locations may prove to be greater generators than others over time as their economies change and develop and patterns of employment change and develop.

The express coach service should be helpful in managing travel demand in the changed world around the COVID pandemic – with some people choosing to continue to work from home, for some or all of the week, having a flexible provision will be important.

### 5.1.5 Designing the services

The service patterns will be delivered in response to demand in “real time” once occupations at the development start. Hence, services will be run when there is demand for them – and the demand will be leveraged through the promotion of the MaaS system and the bespoke services as part of the sales process for the development. It will be sustained by the operator, Zeelo, who have a sophisticated and well-established promotional and support team as part and parcel of their service provision. Hence, the services will be delivered flexibly over time in terms of destinations and



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Bespoke Coach Strategy

operations – initially with smaller vehicles, in each case, and then using larger vehicles, flexibly, as demand increases.

There will also be decision points regarding whether it is better to operate two smaller vehicles on a route, to provide greater flexibility of departure times for users, or fewer larger vehicles. This is likely to depend on a number of factors:

- Demand for the service
- Daily variability in demand
- Distance from Sharpness – feasibility of re-using vehicles on a loop
- Distance from Sharpness – feasibility of users having flexibility through access to alternative modes in emergencies – for example, Uber and similar services should be available through the MaaS system if someone misses a bus. This could therefore be available at no additional cost to the user, depending on MaaS subscriptions.

The service patterns will also configure vehicles as efficiently as possible, with the options for them to be varied on a day-by-day basis if necessary. It would also be practical to incorporate switching of resources over time – so, for example, whilst there would be a demand for running a larger coach to Gloucester (or maybe two) before the first train services began to operate, once this happened, these coaches should be able to divert to, say, a Bristol city service, as by then the progress of development would mean that a larger vehicle would be appropriate on that service.

### 5.1.6 Funding

The services will need to be viable – but not necessarily purely on the basis of the farebox.

The structure of the business model that underpins transport at Sharpness Vale will be quite different to that which has traditionally applied to public transport services. This is critical, because the way that people access and use services has changed. A good deal of 21<sup>st</sup> century public transport will be focussed on informed users, potentially adopting an all-encompassing subscription model to meet their transport needs, rather than the provision of the “season ticket” approach that has prevailed for decades.

#### 5.1.6.1 The changing face of the bus service model

To illustrate this – the traditional model of public transport services has revolved around an operator offering to run a service on a published timetable, and users choosing to align with it to satisfy their need to travel. This might mean that an individual user has to travel at a time when it is less convenient for them, or may have to ride a longer journey to allow for the operator to cater for other users with other requirements.

Much of this was also built around the availability of service information – in the period before the internet and data enabled mobile phones, the service model was entirely reliant on the publishing of timetables, and then delivering services that ran according to them. Once people had accessed the timetable information – often only available at a stop or on the service itself, they expected it to operate according to that schedule.





## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Bespoke Coach Strategy

That is no longer a constraint of operation.

The instant, and portable, availability of data means that people can plan journeys in real time – if they can see that their bus is running late, they can use that time to buy a newspaper, if they can see that it is really late, they can use their integrated transport apps (MaaS) to make alternative arrangements, quickly and in real time.

This also means that the model can change to one that is built around multiple types of service, operated at different times, in different ways, by different operators and with different vehicles. And users expect to be able to interact with all of these different types of service to meet their changing needs day-by-day and week-to-week.

The express coach model at Sharpness Vale is intended to help to meet this changing model.

#### 5.1.6.2 Sources of revenue

The express coach services at Sharpness Vale are therefore intended to be part of a much broader mix of transport modes, and providers, but fulfilling an important function at the upper tier of public transport provision. Hence, just as the train will provide a “mass” capacity of movement to Cam & Dursley and Gloucester, so the express coach services will sit alongside them offering larger capacity movement directly between Sharpness and other key destinations.

In terms of sources of funding for the services, experience from new growth point developments elsewhere suggests that there will be essentially four sources of funding – with the balance between them changing over time:

- The fare box
- MaaS contributions
- Service Charge contribution
- Shortfall “pump-prime” funding at the outset

#### The fare box

This would be the traditional payment of a fare for use of the service – even though this may be done using contactless technology, and may even have been pre-booked and paid for through an app, it would still be a simple transactional arrangement to pay to get on the bus on a given journey.

The viability model that has been developed has been developed on the basis that the daily fare on the coach must be as close as possible to the *marginal cost* of car usage on the same route. This marginal cost is essentially the fuel and parking charges that users may otherwise expend each day. It recognises that most people do not perceive the costs of car usage as the all-in cost on a “per mile” basis, including tax, insurance, servicing, depreciation and so on. People who own cars generally consider the capital and annual costs to be “sunk” costs, on the basis that they need to own a car anyway.

Therefore, to be seen as competitive, the coach service needs to have costs fixed at a similar marginal cost level.



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Bespoke Coach Strategy

The costs used in this assessment have been based on the following criteria to establish the fare per trip:

RIDER FARE BASED ON FUEL + PARKING COSTS						
	Miles	Litres	Rate	Cost	Parking per day	TOTAL per day
Bristol	33 miles	4.5	£1.20	£5.40	£2.50	<b>£7.90</b>
Gloucester	18.5 miles	2.54	£1.20	£3.05	£3.00	<b>£6.05</b>
Stroud	16 miles	2.2	£1.20	£2.64	£1.50	<b>£4.14</b>

This represents the marginal cost of car usage for a journey to each of these destinations, for an average car, with a typical parking charge, and hence forms a sensible basis for determining the appropriate competitive fare for each journey. The parking costs represent half of the daily charge – as this effectively splits the daily cost between the two daily fare payments – one there and one back.

### The MaaS contribution

As residents subscribed to the MaaS provision, and paid a monthly subscription to access a range of travel services, a proportion of this would be allocated to the bus and coach services. This could be on a “patronage” basis, where users would sign in to the coach service when they use it, and that draws down part of the MaaS funds as a de facto farebox subsidy payment, or could be on a “fixed proportion” basis, where a defined level of MaaS funds are pre-allocated to the express coach services to ensure that they are sustained.

The model could also, of course, be configured around a combination of both of these together.

It is expected that the operator would engage in the marketing and development of the coach services, and so this element of the contribution would ensure that this was done in a holistic way. The MaaS contribution could form part of an incentivisation package for the operator.

### Service Charge contribution

Most new developments have a service charge – often used purely to deal with the maintenance of public open spaces on the site. However, it can also be a useful source of funding for transitional transport services such as sustainable services.

It is valuable in making a direct connection between the bus services on site and the residents – the service becomes one that is, to some degree, in their ownership and is “their” service, which they can influence through the management company over time (assuming, as is typical, that the ownership of the company would ultimately sit with the residents).

The philosophy here is to use the service charge as a “nudge” technique. The psychology for residents is to get them to recognise that as they are already contributing to the service, they may as well make use of it. This can be especially useful in larger households, where they may move into the site as a “two-car” family, but can use the MaaS and sustainable transport services to downscale to a single car household – with other journeys being met by the services on offer – for which they are already contributing.

### Shortfall “pump-prime” funding



## **SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES**

### Bespoke Coach Strategy

This would be seedcorn and pump-priming funding, mostly configured around the initial stages of development and service provision, to help to establish the services and support them when development patronage is low in the early years.

Typically this would be underwritten by the developer, and is usually a function of a planning condition that requires that the service be provided. This would be the case here – but it may be that the bespoke coach operation can be traded as a going concern to a suitable specialist investor or operator. Over time the service would create a return, and hence it represents a saleable investment opportunity. This would need to be resolved nearer the time as a commercial decision on the part of the developer.



## 6.0 EXPRESS COACH SERVICE APPRAISAL

The appraisal of the way that the express coach service will be delivered is set out in the spreadsheet models included at Appendix A.

Two separate models have been constructed – the first relates to the 2,400 home Local Plan allocation scenario, and the second extends this to include the full 5,000 homes that are anticipated to be built at the Sharpness Vale growth point. Both scenarios include the 10ha employment land uses, and supporting uses.

### 6.1.1 Spreadsheet models

The two spreadsheets are set out in the same way, with the proposed housing trajectory set out across the top (this is taken from the business case documents submitted for the Restoring your Railway Fund bid, and so is directly comparable with that assessment). The 2,400 home (Local Plan) development case model follows the trajectory that is identified in the draft Local Plan. The 5,000 model has an accelerated schedule of delivery, with 2,400 homes being delivered by c.2036, and the full 5,000 homes by c.2042.

The spreadsheets then set out, down the page, the costs of coach provision (the number and size of coaches being related to the ridership forecasts detailed towards the bottom of the page) for each of the three core services – to Bristol, Gloucester and Stroud that are being contemplated for the express coach services. This is calculated as a daily cost, and then an annual cost for each route, and as an overall service provision total.

The projected ridership is then set down (based on the Transport Technical Assessment), and the farebox income calculated on the basis of the marginal car usage costs detailed in the section above.

At the bottom of each sheet the costs and farebox income are added together to provide an overall profit or shortfall figure. Allowances are then made for a modest contribution to the service from the Estate Management Charge, of £40 per dwelling per annum, and a contribution from the MaaS subscription based on £10 per month from all subscribers, on the basis that one person took up the subscription in 20% of the homes at Sharpness. This is considered to be a conservative estimate of potential take-up, but provides a robust figure for appraisal purposes.

Finally, any deficit in the early years is calculated, and the costs of pump-priming the service are considered.

### 6.1.2 2,400 home model

This model shows that the express coach services could be expected to be self-supporting from around the 400<sup>th</sup> occupation at Sharpness, on the basis of the farebox and other assumptions made above.

Returns accrue thereafter, and so this suggests that it would be possible to adjust the funding sources to make the service more competitive with the car. The Estate Management contribution could be wound back in later years, which would be helpful as more of the public open space on the site becomes adopted and creates a heavier management burden. The management charge can make a



## SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

### Express Coach Service Appraisal

useful contribution in the early years, and could then be redeployed towards the maintenance costs on the site.

It would be possible to offer a more competitive fare as well. However, in the early years of development this would create a much greater burden in terms of the pump-priming funding, and so this may not be affordable for the developer to fund. If a suitable “patient capital” investor could be found for the service, then they may be willing to take a long-term view of the commercial returns that can be made in future years, and so may be content to charge lower fares in order to establish the service, and encourage a greater future return for themselves.

Overall, the model suggests that the service would require a pump-prime investment to establish it of £160,978 (or £67.07 per house).

#### **6.1.3 5,000 home model**

This shows the same profile in the first few years – with the service breaking even from the 400<sup>th</sup> dwelling. This is because the same housing trajectory, and hence the same service patterns are in place during these years.

However, in this model, there is a further dip in revenue at c.500 occupations, as the model assumes that this is when the railway service commences. As a result, some patronage switches to the railway, and the express coach services are pushed back into the position that existed earlier in the development. A further pump-prime sum is required to recover the service and set it back on course for a return.

This model therefore suggests that a pump-prime investment of £191,673 (£38.33 per house) would be required to establish the service.



## **SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES**

Appendix A Spreadsheet Model

### **Appendix A SPREADSHEET MODEL**

NOTE: Spreadsheet model pages are replicated below, but at small scale, for completeness. The full size Excel file has been provided alongside the submission of this report.

# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

## Appendix A Spreadsheet Model

### SHARPNESS - Bespoke Coach Services Outline Business Plan

#### Numbers and Cost of Coach Services

Routes		Route 1				TOTAL TRIPS		TOTAL JOURNEYS	
		Bristol	Aztec West	UWE	Airbus				
Year	Homes								
4	650	45	16	25	13	14	13	126	252
8	1,600	110	40	62	31	35	31	309	618
12	2,400	165	60	93	46	53	46	435	870
		Peak Hour Coach Trips							
16 seater	8	4	3	2	2	2	2	16 seater	8
33 seater	20	10	6	4	4	4	4	33 seater	20
78 seater	28	14	9	6	6	6	6	78 seater	28
16 seater	£430	£3,440	£8,600	£12,040	£4,300	£5,000	£5,130	16 seater	£430
33 seater	£500	£2,000	£5,000	£7,000	£500	£1,710	£1,460	33 seater	£500
78 seater	£730	£1,460	£2,920	£4,380	£730	£1,460	£1,460	78 seater	£730

Routes		Route 2				TOTAL TRIPS		TOTAL JOURNEYS	
		Gloucester	Oldends	Ind. Est.					
Year	Homes								
4	650	70	30	74	100	200	100	200	200
8	1,600	0	74	148	74	148	74	148	148
12	2,400	0	112	348	174	348	174	348	348
16 seater	7	4	2	2	16 seater	7	4	2	2
33 seater	5	3	2	1	33 seater	5	3	2	1
78 seater	11	6	4	3	78 seater	11	6	4	3
16 seater	£430	£3,010	£2,000	£1,140	£430	£500	£570	£730	£730
33 seater	£2,150	£1,500	£1,140	£2,280	£2,150	£2,000	£1,140	£1,460	£1,460
78 seater	£4,730	£3,000	£2,280	£2,190	£4,730	£3,000	£2,280	£2,190	£2,190

Routes		Route 3				TOTAL TRIPS		TOTAL JOURNEYS	
		Stroud							
Year	Homes								
4	650	30	60	104	30	60	30	60	60
8	1,600	74	148	208	74	148	74	148	148
12	2,400	112	208	208	104	208	104	208	208
16 seater	2	1	1	2	16 seater	2	1	1	1
33 seater	5	3	2	1	33 seater	5	3	2	1
78 seater	7	4	2	2	78 seater	7	4	2	2
16 seater	£430	£860	£1,500	£1,140	£430	£500	£570	£730	£730
33 seater	£2,150	£1,500	£1,140	£1,460	£2,150	£1,500	£1,140	£1,460	£1,460
78 seater	£3,010	£2,000	£1,140	£1,460	£3,010	£2,000	£1,140	£1,460	£1,460

- Notes:**
- Optimum vehicle usage shown in red and bold
  - Longer journeys / more complex journeys could be split into more routes if necessary - cost would go up, but could be done if farebox / attractiveness warranted.
  - Initial services may well happen with smaller vehicles, can be flexed to larger ones as operations allow

#### RIDER FARE BASED ON FUEL + PARKING COSTS

Miles	Litres	Rate	Cost
Bristol GL13 9NF	BS1 6BD 33 miles	4.5	£7.90
Gloucester GL13 9NF	GL1 1DS 18.5 miles	2.54	£6.05
Stroud GL13 9NF	GL5 3BD 16 miles	2.2	£4.14

Parking Costs (Half daily charge - split into TWO fare payments there and back):

	Rate
Bristol	£2.50 per day
Gloucester	£3.00 per day
Stroud	£1.50 per day

#### RIDER FARE BASED ON FUEL + PARKING COSTS

Miles	Litres	Rate	Cost	Parking per day	TOTAL per day
Bristol	33 miles	4.5	£7.90	£2.50	£10.40
Gloucester	18.5 miles	2.54	£6.05	£3.00	£9.05
Stroud	16 miles	2.2	£4.14	£1.50	£5.64

Parking Costs (Half daily charge - split into TWO fare payments there and back):

	Rate
Bristol	£2.50 per day
Gloucester	£3.00 per day
Stroud	£1.50 per day

# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

## Appendix A Spreadsheet Model

SHARPNESS - Bespoke Coach Services Outline Business Plan		2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Local Plan process - Phase 1 - 2,400 homes + Employment																	
Local Plan allocation confirmed																	
Planning application - Phase 1																	
Planning consent																	
Construction starts																	
Housing trajectory - occupations this year																	
Housing completions - cumulative		0	50	100	200	300	400	500	650	800	950	1100	1250	1480	1710	1940	230
Notes:																	
1. For Business Case purposes, assumption is that service operates Morning and Evening Peak																	
2. Other services could be introduced, or patterns expanded according to demand																	
<b>Zeele Coach Provision</b>																	
Route 1 - Bristol employment sites	16 / 33 seaters 53 seaters 78 seaters	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Route 2 - Gloucester & surrounds	16 / 33 seaters 53 seaters 78 seaters	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Route 3 - Stroud	16 / 33 seaters 53 seaters 78 seaters	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1
<b>Zeele Coach DAILY COST</b>																	
Route 1 - Bristol employment sites	16 / 33 seaters 53 seaters 78 seaters	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730
Route 2 - Gloucester & surrounds	16 / 33 seaters 53 seaters 78 seaters	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730
Route 3 - Stroud	16 / 33 seaters 53 seaters 78 seaters	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730	£470 £570 £730
<b>Zeele Coach ANNUAL COST</b>																	
Route 1 - Bristol employment sites	16 / 33 seaters 53 seaters 78 seaters	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500
Route 2 - Gloucester & surrounds	16 / 33 seaters 53 seaters 78 seaters	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500
Route 3 - Stroud	16 / 33 seaters 53 seaters 78 seaters	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500	£117,500 £142,500 £182,500
<b>TOTAL COSTS:</b>																	
TOTAL COSTS:		£0	£117,500	£377,500	£402,500	£560,000	£742,500	£742,500	£925,000	£975,000	£1,015,000	£1,095,000	£1,122,500	£1,472,500	£1,537,500	£1,720,000	£1,877,500
<b>RIDERSHIP</b>																	
Route 1 - Bristol employment sites		0	50	75	75	210	225	252	322	390	460	550	618	670	730	800	870
Route 2 - Gloucester & surrounds		0	0	56	100	100	170	200	210	230	250	148	148	200	250	300	348
Route 3 - Stroud		0	0	30	40	40	46	54	60	75	90	115	128	148	160	175	208
<b>FAREBOX</b>																	
Route 1 - Bristol employment sites	£7.90	£0	£98,750	£148,125	£148,125	£414,750	£444,375	£497,700	£695,950	£770,250	£908,500	£1,086,250	£1,220,550	£1,323,250	£1,441,750	£1,580,000	£1,718,250
Route 2 - Gloucester & surrounds	£6.05	£0	£0	£84,672	£131,200	£151,200	£257,040	£302,400	£317,520	£347,760	£378,000	£223,776	£223,776	£302,400	£378,000	£453,600	£526,176
Route 3 - Stroud	£4.14	£0	£0	£31,050	£41,400	£47,610	£59,890	£62,100	£77,625	£93,150	£119,025	£132,480	£153,180	£165,600	£181,125	£196,650	£215,280
<b>TOTAL FAREBOX:</b>																	
TOTAL FAREBOX:		£0	£98,750	£263,847	£340,725	£613,560	£757,305	£862,200	£1,031,095	£1,111,160	£1,405,525	£1,442,506	£1,597,506	£1,791,250	£2,006,875	£2,230,250	£2,459,706
<b>SHORTFALL TO FUND</b>																	
SHORTFALL TO FUND		£0	£18,750	£113,653	£61,775	£53,560	£14,805	£119,700	£106,095	£236,160	£390,525	£347,506	£385,006	£318,750	£463,375	£510,250	£582,206
Management Charges		£400	£4,000	£8,000	£12,000	£16,000	£20,000	£26,000	£32,000	£38,000	£44,000	£50,000	£59,200	£68,400	£77,600	£86,800	£96,000
Maas Subscription contributions		£120	£1,200	£2,400	£3,600	£4,800	£6,000	£7,200	£8,400	£9,600	£10,800	£12,000	£13,200	£14,400	£15,600	£16,800	£18,000
£40 per month per subscriber - assume 20% take-up		£2,000	£14,750	£105,653	£62,575	£79,160	£46,805	£161,300	£157,295	£296,960	£460,925	£427,506	£479,726	£428,190	£587,535	£649,130	£735,806
Pump-prime required:		£0	£12,750	£105,653	£42,575	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
<b>ADJUSTED CUMULATIVE ASSESSMENT:</b>																	
ADJUSTED CUMULATIVE ASSESSMENT:		£2,000	£0	£0	£0	£79,160	£125,965	£287,265	£444,560	£741,520	£1,202,445	£1,629,951	£2,109,677	£2,537,867	£3,125,402	£3,774,532	£4,510,338



# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

## Appendix A Spreadsheet Model

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
<b>SHARPNESS - Bespoke Coach Services Outline Business Plan</b>																		
<b>5,000 House Development Case Model</b>																		
Local Plan process - Phase 1 - 2,400 homes + Employment																		
Local Plan allocation confirmed																		
Planning application - Phase 1																		
Planning consent																		
Construction starts																		
Housing trajectory - occupations this year	50	50	100	100	100	100	100	150	150	150	150	150	230	230	230	230		
Housing completions - TOTAL for SHARPNESS VALE	0	50	100	200	300	400	500	700	1000	1300	1600	1900	2430	2960	3490	4020	4850	5000
Notes:	1. For Business Case purposes, assumption is that service operates Morning and Evening Peak 2. Other services could be introduced, or patterns expanded according to demand																	
<b>Zeelo Coach Provision</b>																		
Route 1 - Bristol employment sites	0	1	1	1	1	1	1	1	1	1	1	2	2	1	1	1	1	1
16 / 33 seaters						£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470
53 seaters						£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
78 seaters						£730	£730	£1,140	£2,190	£2,390	£4,380	£4,380	£5,840	£7,300	£8,030	£8,760		
Route 2 - Gloucester & surrounds	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
16 / 33 seaters						£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470
53 seaters						£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
78 seaters						£730	£730	£1,140	£1,460	£2,190	£2,190	£2,190	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920
Route 3 - Stroud	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
16 / 33 seaters						£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470	£470
53 seaters						£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
78 seaters						£730	£730	£1,140	£1,460	£2,190	£2,190	£2,190	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920
<b>Zeelo Coach DAILY COST</b>																		
Route 1 - Bristol employment sites	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670
16 / 33 seaters	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
53 seaters	£730	£730	£1,140	£1,460	£2,190	£2,190	£2,190	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920
78 seaters																		
Route 2 - Gloucester & surrounds	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670
16 / 33 seaters	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
53 seaters	£730	£730	£1,140	£1,460	£2,190	£2,190	£2,190	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920
78 seaters																		
Route 3 - Stroud	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670	£670
16 / 33 seaters	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570	£570
53 seaters	£730	£730	£1,140	£1,460	£2,190	£2,190	£2,190	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920	£2,920
78 seaters																		
<b>Zeelo Coach ANNUAL COST</b>																		
Route 1 - Bristol employment sites	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500
16 / 33 seaters	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500
53 seaters	£182,500	£182,500	£285,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000
78 seaters																		
Route 2 - Gloucester & surrounds	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500
16 / 33 seaters	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500
53 seaters	£182,500	£182,500	£285,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000
78 seaters																		
Route 3 - Stroud	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500	£117,500
16 / 33 seaters	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500	£142,500
53 seaters	£182,500	£182,500	£285,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000	£385,000
78 seaters																		
<b>TOTAL COSTS:</b>																		
	£117,500	£117,500	£377,500	£402,500	£402,500	£560,000	£920,000	£995,000	£1,095,000	£1,472,500	£1,862,500	£2,715,254	£3,155,170	£3,594,586	£4,034,002	£4,473,418	£4,912,834	£5,352,250
<b>RIDERHIP</b>																		
Route 1 - Bristol employment sites	0	0	50	75	75	210	225	280	442	604	766	928	1090	1252	1414	1576	1740	1900
16 / 33 seaters						300	300	170	220	273	326	379	432	485	538	591	644	696
53 seaters						40	40	54	70	108	146	184	222	260	298	336	374	416
78 seaters																		
<b>FAREBOX</b>																		
Route 1 - Bristol employment sites	£7,600	£8,750	£140,625	£140,625	£140,625	£444,375	£553,000	£577,860	£1,109,890	£1,413,850	£1,513,850	£2,163,750	£2,467,700	£2,771,650	£3,075,600	£3,379,550	£3,683,500	£3,987,450
16 / 33 seaters	£8,625	£8,625	£151,200	£151,200	£151,200	£467,100	£583,640	£612,776	£1,109,812	£1,313,818	£1,413,818	£1,963,110	£2,267,060	£2,571,010	£2,874,960	£3,178,910	£3,482,860	£3,786,810
53 seaters	£3,975	£3,975	£44,400	£44,400	£44,400	£137,275	£169,360	£165,084	£330,078	£400,032	£400,032	£540,640	£609,640	£669,640	£729,640	£789,640	£849,640	£909,640
78 seaters																		
Route 2 - Gloucester & surrounds	£8,750	£8,750	£140,625	£140,625	£140,625	£444,375	£553,000	£577,860	£1,109,890	£1,413,850	£1,513,850	£2,163,750	£2,467,700	£2,771,650	£3,075,600	£3,379,550	£3,683,500	£3,987,450
16 / 33 seaters	£8,625	£8,625	£151,200	£151,200	£151,200	£467,100	£583,640	£612,776	£1,109,812	£1,313,818	£1,413,818	£1,963,110	£2,267,060	£2,571,010	£2,874,960	£3,178,910	£3,482,860	£3,786,810
53 seaters	£3,975	£3,975	£44,400	£44,400	£44,400	£137,275	£169,360	£165,084	£330,078	£400,032	£400,032	£540,640	£609,640	£669,640	£729,640	£789,640	£849,640	£909,640
78 seaters																		
Route 3 - Stroud	£8,750	£8,750	£140,625	£140,625	£140,625	£444,375	£553,000	£577,860	£1,109,890	£1,413,850	£1,513,850	£2,163,750	£2,467,700	£2,771,650	£3,075,600	£3,379,550	£3,683,500	£3,987,450
16 / 33 seaters	£8,625	£8,625	£151,200	£151,200	£151,200	£467,100	£583,640	£612,776	£1,109,812	£1,313,818	£1,413,818	£1,963,110	£2,267,060	£2,571,010	£2,874,960	£3,178,910	£3,482,860	£3,786,810
53 seaters	£3,975	£3,975	£44,400	£44,400	£44,400	£137,275	£169,360	£165,084	£330,078	£400,032	£400,032	£540,640	£609,640	£669,640	£729,640	£789,640	£849,640	£909,640
78 seaters																		
<b>TOTAL FAREBOX:</b>																		
	£8,750	£8,750	£281,250	£281,250	£281,250	£888												

# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

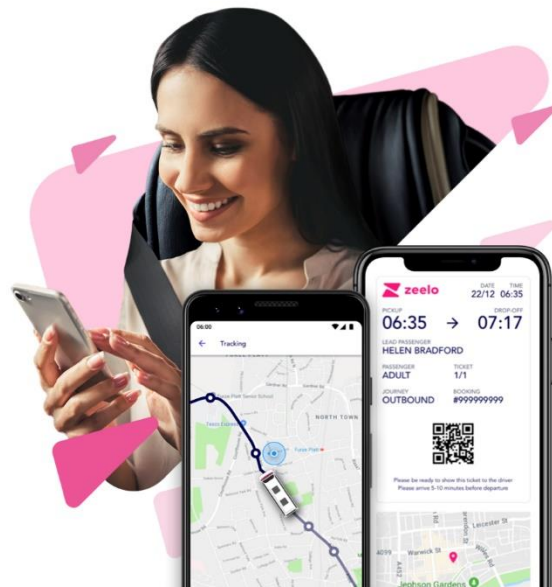
Appendix B Zeelo Commercial Proposition

## Appendix B ZEELO COMMERCIAL PROPOSITION



Sharpness Development LLP

## Providing a tailored, coach service for Sharpness Vale



### The brief

- c.2023 - 2026 start - exact date tbc , but consideration to estimate future growth years :
  - Yr 4.
  - Yr 8.
  - Yr 12
- Consideration for the transport provision to provide:
  - Peak periods captured by sustainable transport modes
  - Ease of access to key employment sites, and stations /lines (with access routes to Gloucester and Bristol)
  - A service that can "ramp up" from first phase of development to "end state"
  - With flexibility..... for destinations to change throughout the development process
- Based on a 5 day service - tbc
- Consideration to two hour peak timetable slots
  - 0700- 09.00am
  - 17.00-19.00 pm
- Targeting initially a "budget focussed" solution, with a 12 - 24 months contract period
  - Fares initially paid for by the developer
  - Then partly subsidised periods- tbc
  - Ultimately moving towards a full "farebox" system
- Simple view on costings to determine next steps
  - note, full end to end service is included within our costs

© Copyright 2020 zeelo



### A demand-led bus service- ZEELO

- Delivering a fully adaptable service
- Zeelo's booking technology and app will ensure an ongoing data flow allows tight management of this service
- Zeelo's app lets passengers book rides, and Zeelo manage and track the journeys for the development
- Regular management reporting and recommendation to service changes will deliver significant cost savings to the development
- On going service changes (time tabling and vehicle provision) to ensure supply meets demand -
  - the objective is the vehicle provision should always aim to match the passenger numbers
- The Zeelo costs includes a fully managed service- 24/7 passenger and client support

© Copyright 2020 zeelo

## Zeelo builds tailored solutions.....

**1**

**Enhanced routing using residents data**

**2**

**Easy-to-use booking & tracking tools built for employees**

**3**

**Serviced by high quality vetted operators**

**4**

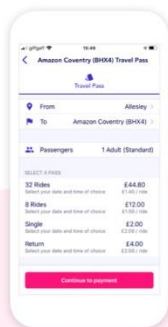
**Transparent and actionable reporting that is fully automated**

**5**

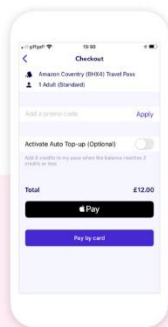
**Dedicated client support teams, residents support and account management**



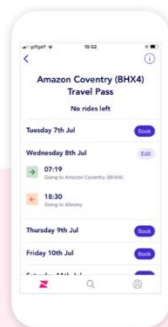
**We deliver a superior on-the-day experience for our customers on our app and website**



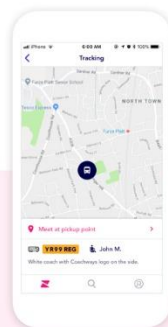
**Tickets & Passes**  
Single, return tickets or larger subscription bundles



**Purchasing**  
Residents can buy tickets on the app



**Manage rides**  
Change your bookings if something changes



**Tracking**  
Live vehicle tracking and reminders alerts



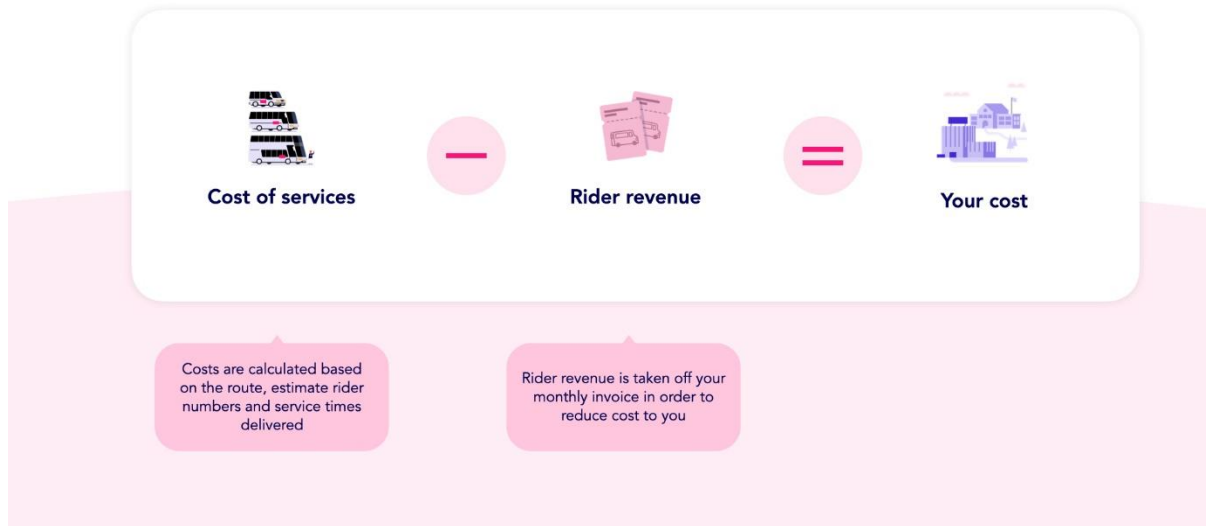
**Customer support**  
Live chat available on our app

**How does Zeelo's deliver on your key objectives**

- Flexibility of service to assist with a currently unknown future demand & routing
- A phased introduction to the this new services development
- Provision of X routes / services, whilst minimising capital commitment
- Delivering cost efficiency and value, matching the changing demand with the provision of the right supply
  - vehicle size & frequency can be managed ongoing
- An opportunity to further reduce cost with a potential charge of services
  - this can still be substantially subsidised whilst significantly reducing cost
- To provide a long term cost efficient and sustainable transport service at the Sharpness Development



## How our model can work to reduce your cost



### PROPOSAL • SHARPNESS VALE

Transporting Development residents to key employment locations.

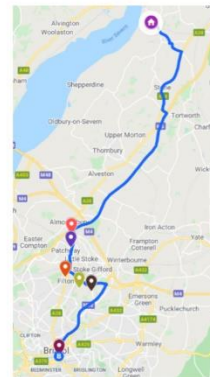
**Shared multiple drop off Bristol service to include:** MoD, Airbus, Rolls Royce, Aztec West, Bristol, UWE

Service description	Outbound		Return	
	Departure Times	Arrival Times	Departure Time	Arrival Time
Journey Time Approx 35 Mins	06:50, 08:10	07:30, 08:50	17:00, 18:20	17:40, 19:00

#### Price estimates

Vehicle size	16 seater	33 seater	53 seater	78 Seater
Gross daily cost	£410-£450	£475-£530	£540-£600	£690-£760
Net daily cost 80% sold, £4 per ticket return	£300-£340	£270-£320	£200-£260	£190-£270
Capped capacity 1m spacing	8 seats	16 seats	25 seats	39 Seats
Net daily cost 1m social distancing, 80% sold, £4 per ticket return	£360-£400	£370-£420	£380-£440	£440-£520

### GL13 9NG <-> Bristol



- Housing Development
- Aztec West
- Rolls Royce
- Airbus
- MoD
- UWE
- Bristol

- Flexible Timetable
- Web / Apps booking
- Customer support 24/7
- Reporting & ongoing service optimisation
- Executive vehicle
- Live vehicle tracking
- Marketing programme
- Account management

Costs are estimates only, are based on our experience and workings, and are subject to vehicle availability and require. Excludes VAT (only applicable on vehicles with less than 10 seats). Monthly payment 30 days in advance, 5 day notice to increase and 30 days notice to decrease service as standard



# SHARPNESS VALE – MOBILITY-AS-A-SERVICE AND EXPRESS COACH SERVICES

## PROPOSAL • SHARPNESS VALE

Transporting Development residents to key employment locations.

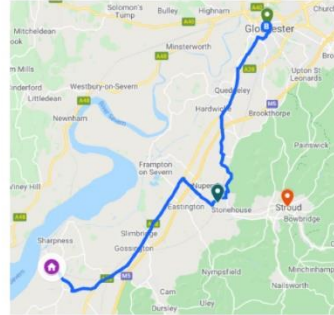
**Shared multiple drop-off Gloucester service to include:** Gloucester, Oldends Ind. Est.

Service description	Outbound		Return	
	Departure Times	Arrival Times	Departure Time	Arrival Time
Estimated Times				
Journey Time Approx 35 Mins	06:50, 08:10	07:30, 08:50	17:00, 18:20	17:40, 19:00

### Price estimates

Vehicle size	16 seater	33 seater	53 seater	78 Seater
Gross daily cost	£410-£450	£475-£530	£540-£600	£690-£760
Net daily cost 80% sold, £4 per ticket return	£300-£340	£270-£320	£200-£260	£190-£270
Capped capacity 1m spacing	8 seats	16 seats	25 seats	39 Seats
Net daily cost 1m social distancing, 80% sold, £4 per ticket return	£360-£400	£370-£420	£380-£440	£440-£520

## GL13 9NG <> Gloucester



- Housing Development
- Oldends
- Gloucester

- Flexible Timetable
- Web / Apps booking
- Customer support 24/7
- Reporting & ongoing service optimisation
- Executive vehicle
- Live vehicle tracking
- Marketing programme
- Account management

Costs are estimates only, are based on our experience and workings, and are subject to vehicle availability and quote. Exclusive of VAT (only applicable on vehicles with less than 10 seats). Monthly payment 30 days in advance, 5 day notice to increase and 30 days notice to decrease service as standard

## PROPOSAL • SHARPNESS VALE

Transporting Development residents to key employment locations.

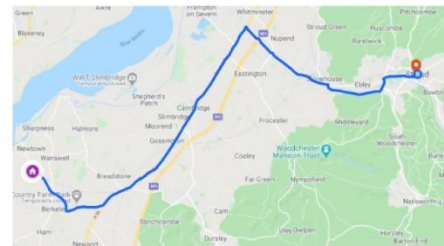
### Stroud Service

Service description	Outbound		Return	
	Departure Times	Arrival Times	Departure Time	Arrival Time
Estimated Times				
Journey Time Approx 35 Mins	06:50, 08:10	07:30, 08:50	17:00, 18:20	17:40, 19:00

### Price estimates

Vehicle size	16 seater	33 seater	53 seater	78 Seater
Gross daily cost	£360-£400	£410-£450	£480-£530	£620-£680
Net daily cost 80% sold, £4 per ticket return	£250-£290	£200-£240	£140-£190	£120-£180
Capped capacity 1m spacing	8 seats	16 seats	25 seats	39 Seats
Net daily cost 1m social distancing, 80% sold, £4 per ticket return	£310-£350	£300-£340	£320-£370	£370-£430

## GL13 9NG <> Stroud



- Housing Development

- Flexible Timetable
- Web / Apps booking
- Customer support 24/7
- Reporting & ongoing service optimisation
- Executive vehicle
- Live vehicle tracking
- Marketing programme
- Account management



## Sharpness Vale Roll Out Plan

Increasing number of routes/vehicles in line with development plan



## An estimated cost proposal and summary- Phase 1 example

- Based on a 5 day week service
- 1x 33 seater vehicle per route
- Three routes put in place @ 2023....next phase tbc
- Example monthly cost\* monthly based on running 5 days (\*21.75 days per month):
  - Ave @ 3x 33 seater coach - daily rate @ circa £1500=£32,625 per month
  - Est. monthly cost of circa £19,575 based on deduction @ \*\*£4 per return ticket sold
  - \*\*£4 return ticket to be amended, confirmed / pending on distance / local rate etc tbc
- Including
  - Fully managed booking services and customer support
  - COVID safe services ...hopefully not required !!
  - All future routing and destination mapping for an adapting service

© Copyright 2020 zeelo

