Bus Industry Costs in February 2026

Confederation of Passenger Transport
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V1.0

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Contents

Executive Summary

The Survey

- This report presents the results of the eighth operator survey in the CPT Cost Monitor series, first launched in 2022. The project now includes eight twice-yearly datasets.
- Returns were received from a total of 63 operating companies, covering 62% of the local bus fleet and 84% of the mileage operated.

The Results

- The rate of increase in unit costs slowed once more. In real terms, there was a third successive small fall.
- Overall gross costs rose by 2.9% between February 2025 and February 2026, from £58.76 per bus hour to £60.45 in Great Britain outside London.
- Adjustment for inflation to Q1 2026[1] prices suggests that there was a real term fall in costs of 1.3%.
- Principal changes in unit costs during the twelve month period were:
    - Vehicle operating costs fell by 4.4%
    - Depreciation and leasing charges rose by 5.0%
    - Overall labour costs were 4.1% higher
    - Engineering costs rose by 28.0%
    - Semi-variable costs increased by 15.2%
    - Claims and insurance costs fell by 3.9%
    - Overhead costs fell by 9.5%.

[1] *Adjusted to Q1 2026 prices by use of the GDP Deflator, sourced from the Quarterly National Accounts from ONS, March 2026 update.*

1. Introduction

1.1 The Purpose of this Document

1.1.1 This document reports on the survey of bus operating members of the Confederation of Passenger Transport (CPT) undertaken in April and May 2026.

1.2 Methodology

1.2.1 Members were requested to supply operating statistics and cost data for a representative week during February 2026, by completing a spreadsheet template. The design of the template and the nature of the data requested was the subject of extensive consultation with CPT members during the autumn of 2022, at the start of this ongoing project.

1.2.2 The responses were transferred into a database format to assist with the analysis process, and this report provides an analysis of the data supplied. The data itself was supplied on the basis of strict confidentiality and individual responses are not disclosed by the analyst to anybody and will not be published. An example of the template is provided in Appendix A. More detail about what is included under each cost heading can be found in Appendix B.

1.3 Responses

1.3.1 Data was supplied for a total of 61 operators, a small decrease from the June 2025 survey, mainly as a result of group reorganisations. The responses are spread across all regions and nations, and between them operated 21,641 peak vehicles. This represents 62.0% of the total local bus fleet in Great Britain, as recorded by the Department for Transport at March 2025[2]. Looking at distance operated, respondents accounted for 81.1% of the national total for 2024/25[3]. Outside London, the fleet represented was 16,923, 65.1% of the total, covering 84.7% of the total kilometres operated. The details are shown in Table 1-1 below.

Table 1-1: Response Rate by Fleet Size & Km Run, Main Market Segments

Market Segment	Fleet Size per DfT	PVR in this return	% included	KM Run per DfT (million)	Annual Km from survey	% included
Greater London	8,913	4,718	52.9%	455	314	68.9%
English Mets	7,894	5,034	63.8%	387	369	95.3%
English Shires	13,603	8,627	63.4%	789	691	87.7%
England	30,410	18,379	60.4%	1,631	1,374	84.2%
Scotland	3,268	2,547	77.9%	286	189	66.1%
Wales	1,226	715	58.3%	80	57	71.1%
GB O/S London	**25,991**	**16,923**	**65.1%**	**1,542**	**1,306**	**84.7%**
ALL GB	**34,904**	**21,641**	**62.0%**	**1,997**	**1,620**	**81.1%**

[2] *Annual Bus Statistics 2025, Department for Transport, Sheet BUS06*

[3] *Ibid, Sheet BUS02km*

1.3.2 We therefore believe that the results offer a representative sample of the industry as a whole, and for each of the main local bus market segments.

1.3.3 Every effort is made to verify the logicality, consistency and structure of the data supplied on arrival. However, this report is of necessity an analysis of data supplied by third parties, and neither 2FM Ltd nor CPT can therefore warrant the accuracy of the inputs that were received.

2. Industry Cost Structure

2.1 Introduction

2.1.1 The returns permit us to examine the structure of industry costs, i.e. the relative importance to the total of each individual heading. We can compare these with a previous breakdown supplied by the *Bus Industry Monitor* project.

2.2 The Analysis Results

2.2.1 The figures for Great Britain outside London for February 2026 are shown below in Figure 1 and can be compared with the same breakdown for the five previous periods, four of which are shown in the graphs at Figure 2 below. Note that to aid legibility, the "Ownership" heading includes depreciation and leasing charges, and "Overheads" includes semi-variable costs.

2.2.2 The figures that underly each of the charts are shown in Table 2-1 below.

Table 2-1: Movements in Bus Industry Cost Structure since 2022
Great Britain outside London

	Mar-2019	Feb-2023	Jun-2023	Feb-2024	Jun-2024	Feb-2025	Jun-2025	Feb-26
Fixed & Semi-Variable Costs								
Overheads	11.4%	15.6%	14.2%	15.2%	14.7%	14.0%	13.2%	12.9%
Claims	2.5%	2.2%	2.2%	2.5%	2.1%	2.5%	2.3%	2.3%
Dep'n & Leasing	8.9%	8.0%	7.6%	7.3%	7.1%	7.3%	7.9%	7.4%
Labour Costs								
Drivers	41.2%	36.3%	37.5%	37.5%	39.3%	38.8%	39.2%	38.7%
Engineers	5.4%	6.4%	6.3%	6.6%	6.3%	6.5%	6.9%	6.5%
Mgt & Admin	4.6%	4.6%	4.7%	4.2%	4.3%	4.5%	4.0%	4.0%
On Costs	4.8%	4.3%	4.8%	4.8%	5.2%	5.2%	6.5%	6.8%
Pensions	3.4%	1.8%	2.0%	2.1%	2.1%	2.0%	1.7%	1.7%
Variable Costs								
Engineering	4.1%	6.5%	6.7%	5.7%	5.5%	6.0%	5.4%	7.4%
Fuel etc	13.7%	14.3%	14.1%	14.2%	13.3%	13.3%	12.8%	12.1%
Summary								
Fixed Costs	22.8%	25.8%	23.9%	24.9%	24.0%	23.7%	23.5%	22.7%
Labour	59.4%	53.4%	55.3%	55.1%	57.2%	57.0%	58.3%	57.8%
Variable Costs	17.8%	20.8%	20.8%	19.9%	18.8%	19.2%	18.2%	19.5%

2.2.3 As can be seen, labour costs have continued to dominate the picture throughout the periods, albeit to a slightly lesser extent than in 2019. They accounted for 57.8% of the total, slightly down on June 2025.

2.2.4 Drivers form the largest component, accounting for 38.7% in February, slightly below from February 2025. Adding in other labour costs, including Employer's NI, Employer Pension Contributions and other on costs, takes the proportion to 45.6%, the highest so far in the series. These figures are the second set to include the increase in Employers' NI which took effect in April 2025.

2.2.5 Direct vehicle operating costs account for a further 19.5%, up from the 18.2% recorded in June 2025 and on the 19.2% recorded in February 2025. The largest component is fuel, oil and tyres on 12.1% - the lowest proportion so far recorded. However, engineering costs (shown as "Parts" in the charts below), rose sharply to 7.4% from the 5.4% recorded in June 2025 and the 6.0% recorded in February 2025, making this the highest proportion recorded in this series.

2.2.6 Fixed costs account for the balance of 22.7%, slightly down on the immediately preceding periods, when the proportion stood at 23.5% and 23.7% respectively.

Figure 1: Breakdown of Bus Industry Costs, February 2026
Great Britain outside London

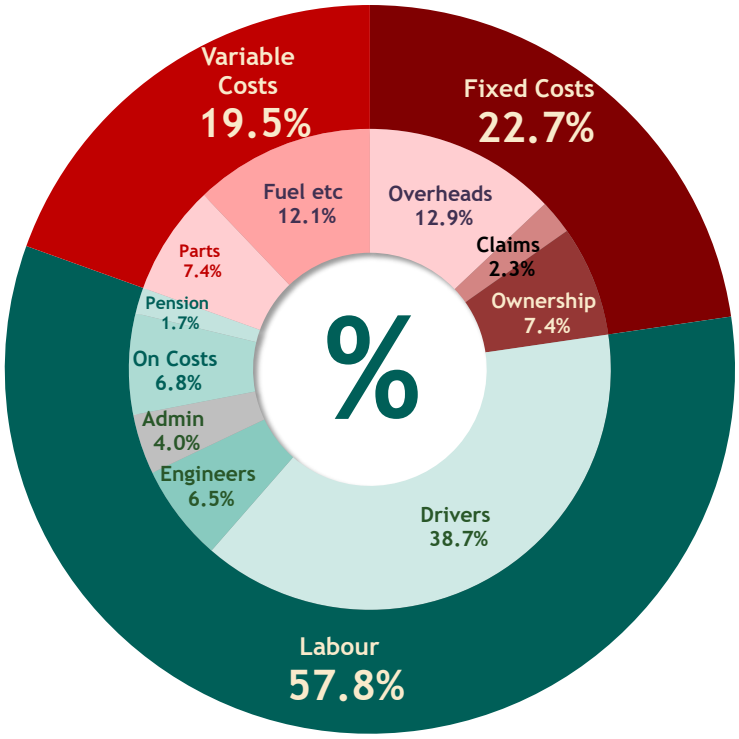
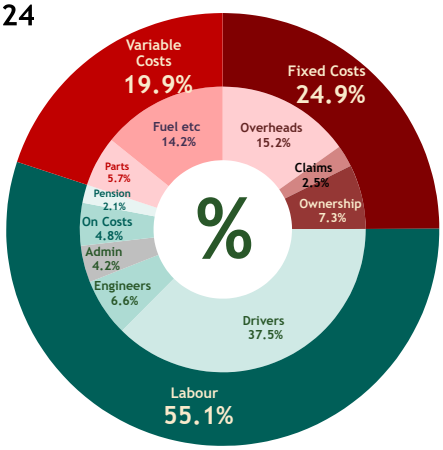


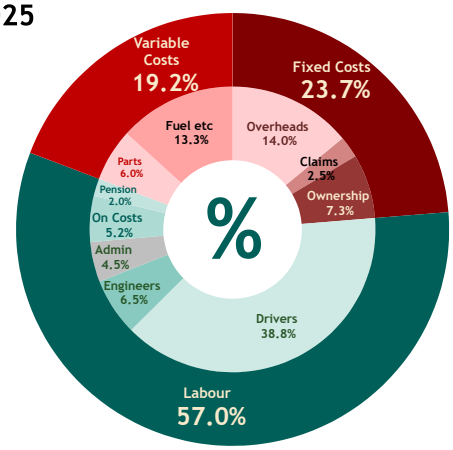
Figure 2: Breakdown of Bus Industry Costs, February 2024-June 2025

Great Britain outside London

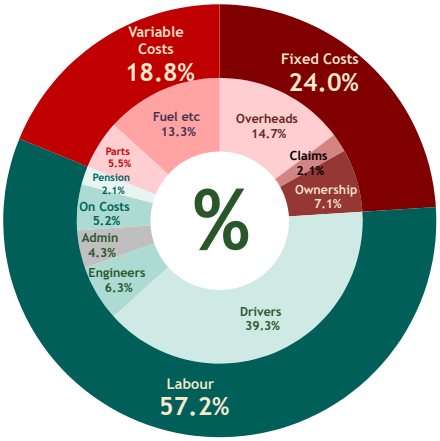
February 2024



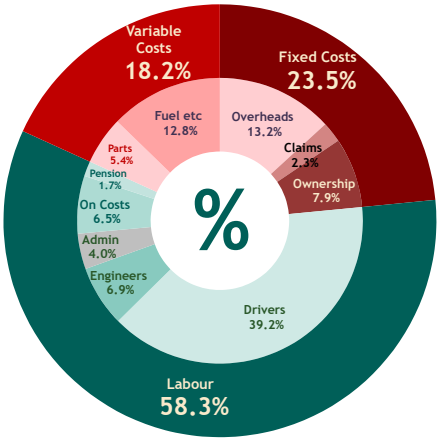
February 2025



June 2024



June 2025



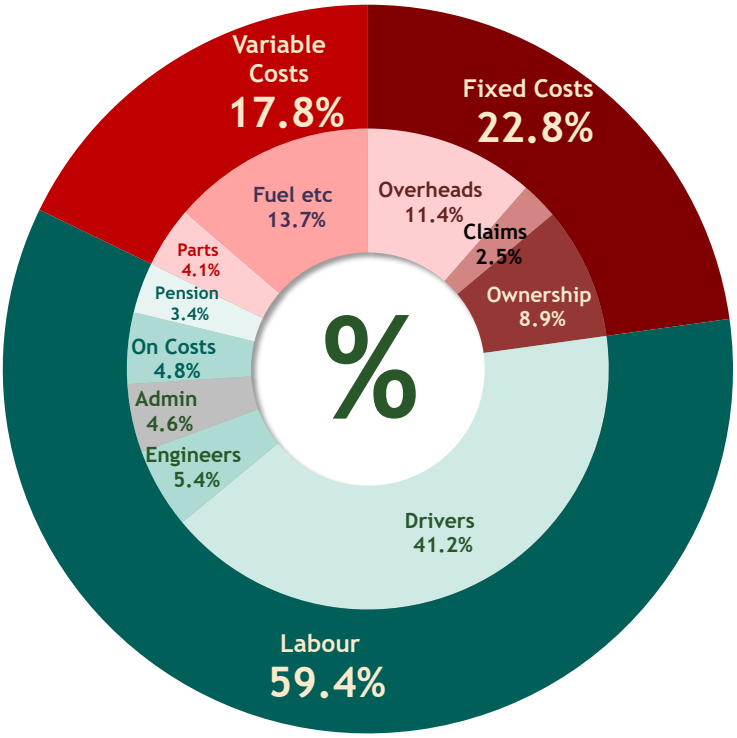
2.3 Comparisons with the Past

2.3.1 The figures above can be compared with the last set produced in 2020, covering the financial year 2018/19, based on an analysis of statutory accounts alongside the CPT cost index. The published breakdown for that year can be seen in Figure 3 below. There may be minor differences in the treatment of individual cost headings, such as employee on costs (including NHI), but the comparison is still of interest.

2.3.2 As can be seen, the proportions have shifted across the period, as labour costs have moved back towards the levels seen in 2019.

Figure 3: Breakdown of Bus Industry Costs, 2018/19[4]

Great Britain outside London



[4] *Source: 2FM analysis of Bus Industry Monitor database.*

3. Changes in Cost Levels

3.1 Approach

3.1.1 Inevitably, changes in cost levels reported by operators have two elements – those caused by the *unit costs* of operation and those resulting from changes in the *scale* of the operation. To track how industry costs are moving, we need to focus on the unit costs.

3.1.2 The previous cost index used kilometres operated as the divisor for all cost headings. To maintain comparisons with previous years, we use the same measure, in section 4.1 below. However, the CPT Cost Monitor has adopted a different approach. This divides the cost headings into three groups, each using different divisors. The precise allocation is shown in Table 3-1 below:

- Cost per kilometre/mile – used for operating costs, such as fuel, oil and tyres
- Cost per bus hour – used for time-based costs such as labour
- Cost per peak vehicle – used for overheads and other similar costs.

Table 3-1: Cost Allocation Methodology

Item	Allocation
Fuel	Per Km
Lubricants	Per Km
Tyres	Per Km
Sub-total Running Costs	**Per Km**
Depreciation - PSV	Per PVR
Depreciation - Other	Per PVR
Leasing - PSV	Per PVR
Leasing - Other	Per PVR
Sub-total Depreciation & Leasing	**Per PVR**
Wages & Salaries	Per Bus Hour
NHI	Per Bus Hour
Pensions	Per Bus Hour
On Costs	Per Bus Hour
Sub-total Labour Costs	**Per Bus Hour**
Engineering (Parts)	Per Bus Hour
Semi-Variable	Per PVR
Claims & Insurance	Per PVR
Overheads	Per PVR
Total Gross Costs	Per Bus Hour

3.2 The 2026 Survey Results

3.2.1 The percentage changes in each sector for each main cost category are shown in Table 3-2 below. There was a reduction in Wales and the English Mets, but other sectors showed increases – the largest being in London on 8.9%, followed by Scotland on 8.2% and the English Shires on 5.2%.

Table 3-2: Changes in Principal Unit Costs by Sector (%)
February 2025 to February 2026

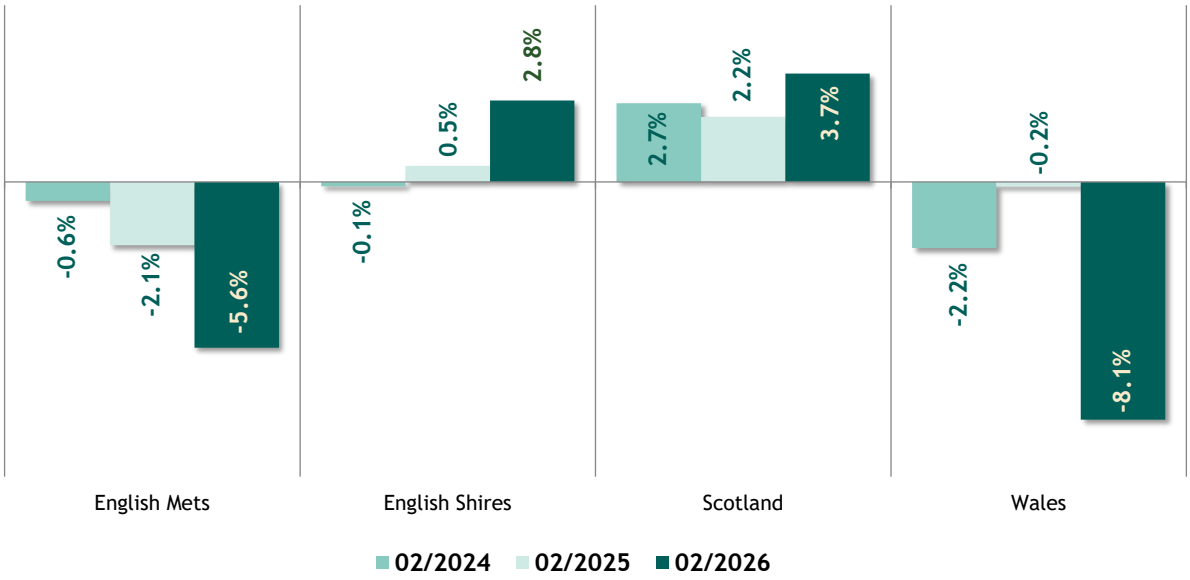
% changes	English Mets	English Shires	Scotland	Wales	GB o/s London	London	All GB
Running Costs	(6.0%)	(4.0%)	(2.6%)	(0.4%)	(4.4%)	(8.4%)	(5.2%)
Dep'n & Leasing	3.7%	6.9%	5.7%	(6.3%)	5.0%	19.1%	8.9%
Labour	6.4%	1.9%	7.3%	1.8%	4.1%	6.0%	4.9%
Engineering	14.9%	42.7%	3.9%	30.8%	28.0%	17.9%	25.4%
Semi-Var. Costs	18.8%	42.5%	(22.9%)	(59.3%)	15.2%	81.5%	26.8%
Claims/Insurance	(20.9%)	5.1%	11.4%	(20.6%)	(3.9%)	64.9%	11.5%
Overheads	(32.5%)	4.5%	(7.0%)	(16.9%)	(9.5%)	17.4%	(6.0%)
Overall	**(0.5%)**	**5.2%**	**4.4%**	**(4.6%)**	**2.9%**	**8.9%**	**4.3%**

3.2.2 The chart at Figure 4 below shows the variation between the gross unit costs per bus hour for each sector.

3.2.3 As can be seen, there was some further divergence in February 2026, with costs in Metropolitan areas were 5.6% below the national level – no doubt reflecting, at least in part, the fact that Transport for Greater Manchester has taken responsibility for costs previously borne by commercial operators – including vehicle and property ownership, network planning and marketing. The increase in costs in Scotland took the level 3.7% above the GB figure. Meanwhile, cost levels diverged downwards in Wales, which may also be associated with moves by Transport for Wales to take more control of the network.

Figure 4: Gross Operating Costs per Bus Hour: Sector Differentials

Variance from figures for Great Britain Outside London



3.3 Variations across the English Regions

3.3.1 The percentage change in the principal cost items in each English region is shown in Table 3-3 below. Two regions saw reductions in unit costs, the Eastern on 4.7% and Yorkshire on 0.5%, whilst the South West was unchanged. All other regions saw increases, the highest of which was the South East on 10.9%, followed by the two Midlands regions on 6.3% each.

3.3.2 The overall changes in each region based on the February 2026 returns are shown in Figure 5 below, whilst the chart at Figure 6 shows the variation between the gross unit costs per bus hour for each region.

3.3.3 There are wide variations, with the North East once again being significantly below the level for Great Britain outside London, with a substantial differential of 18.1%. This is mainly the result of lower unit labour costs, and significantly higher levels of vehicle utilisation. Yorkshire and the Humber also diverges downwards by 7.6%, mainly driven by lower unit labour costs. Nest comes the North West region, 7.5% below, partly driven by the fact that Transport for Greater Manchester has taken over responsibility for a proportion of costs previously borne by commercial operators.

Table 3-3: Changes in Principal Unit Costs by English Region (%)

February 2025 to February 2026

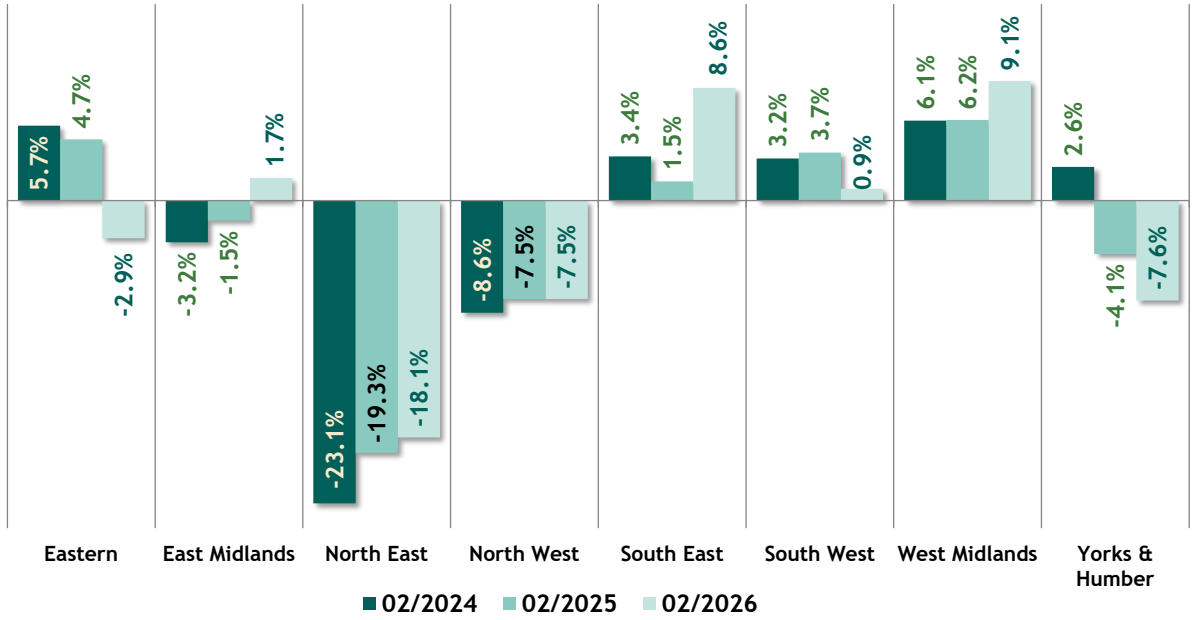
% changes	Eastern	East Midlands	North East	North West	South East	South West	West Midlands	Yorks & Humber
Running Costs	(2.3%)	(4.2%)	(6.8%)	(8.1%)	(1.8%)	(10.7%)	(3.2%)	2.5%
Dep'n & Leasing	(3.7%)	(9.5%)	44.3%	12.8%	15.9%	4.3%	6.9%	(3.5%)
Labour	2.9%	3.5%	1.6%	6.0%	3.5%	3.7%	9.5%	2.5%
Engineering	(3.6%)	47.3%	45.3%	25.9%	74.6%	(1.0%)	4.2%	22.4%
Semi-Var. Costs	(56.2%)	64.4%	13.2%	125.4%	61.1%	32.7%	20.5%	(3.9%)
Claims/Insurance	(28.9%)	(12.8%)	(63.6%)	13.5%	21.3%	15.5%	10.9%	(32.8%)
Overheads	(28.6%)	23.9%	54.1%	(29.2%)	7.8%	(18.4%)	(7.1%)	(27.1%)
Overall	**(4.7%)**	**6.3%**	**3.9%**	**2.9%**	**10.9%**	**(0.0%)**	**6.3%**	**(0.5%)**

Figure 5: Change (%) in Gross Operating Costs per Bus Hour by Region/Sector

February 2025 to February 2026

Figure 6: Gross Operating Costs per Bus Hour: Regional Differentials

Variance from figures for Great Britain Outside London, February 2026

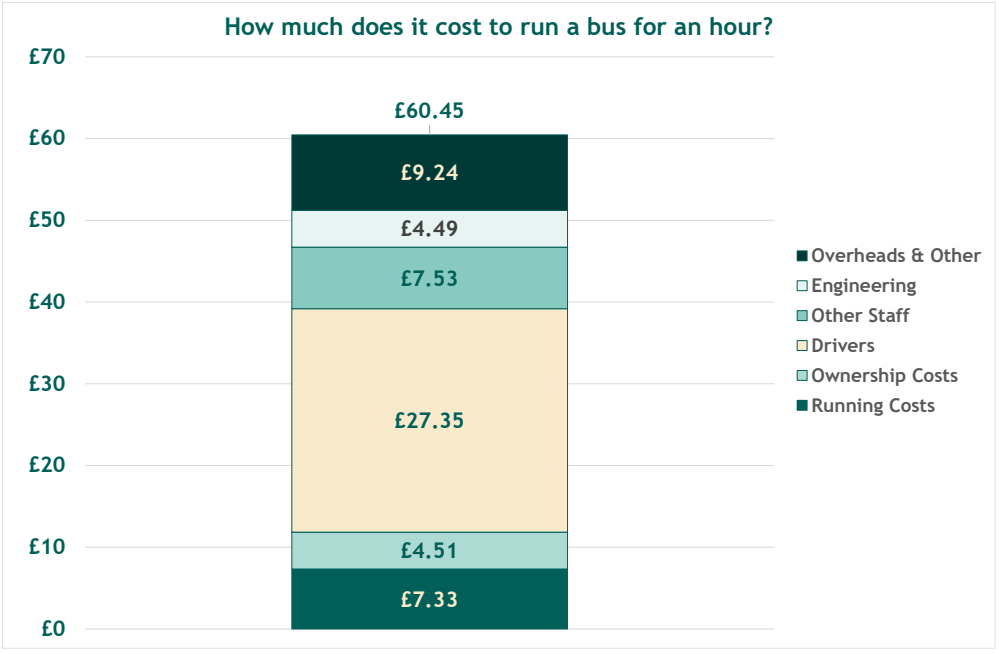


3.4 How much does it cost to run a bus for an hour?

3.4.1 The graph at Figure 7 below shows the breakdown of the cost of running a bus on service for a single hour, based on our most recent survey. As can be seen, the overall total based on our February 2026 survey is £60.45. Of this total, the cost of the driver took up £27.35, with overheads taking up the next largest share at £9.24. Other staff costs are responsible for a further £7.53, with the cost of the fuel, oil and tyres amounting to £7.33.

Figure 7: The Cost of Running a Bus for a Single Hour

Great Britain outside London, February 2026



4. Comparisons with Previous Years

4.1 Methodology

4.1.1 In addition to their voluntary completion of the CPT survey, bus operators are required by law to provide an annual statistical return (known as the STATS100). This annual survey receives information from over 500 operators of all sizes.

4.1.2 The DfT's published figures cover a whole financial year and are taken from the STATS100 returns.

4.2 Comparisons with DfT

4.2.1 It is therefore interesting to compare the results of the February 2026 CPT survey reported here with the most recent DfT figures, which covered the year to 31 March 2025. The comparison is shown in Table 4-1 below. Eleven months elapsed between the financial year end contained in the DfT analysis and the latest CPT survey, so some divergence might be expected.

4.2.2 At the higher level of Great Britain outside London, the CPT survey shows a figure 2.8% above the DfT's. However, gap varies between the different sectors, being 1.6% above in the English Shires, and 0.9% in Wales. In the English Met areas, the CPT figure is 8.5% below the DfT's.

4.2.3 In Scotland, the gap was much larger at 28.9%. This divergence is likely to reflect differences in the fleet size of the operators analysed – since all the respondents to the CPT survey were large operators from the more urban areas of the country.

Table 4-1: CPT and DfT Surveys Compared

DfT results for 2024/25 and CPT Results February 2026 @ March 2026 Prices

Cost (£) per Km	English Mets	English Shires	England Outside London	Scotland	Wales	GB outside London
CPT Survey	3.473	3.223	3.310	3.441	2.964	3.314
Per DfT	3.797	3.173	3.378	2.670	2.938	3.224
% difference	(8.5%)	1.6%	(2.0%)	28.9%	0.9%	2.8%

4.3 Recent Trends

4.3.1 In Table 4-2 below, we have taken the last results of the DfT figures from the analysis above and added on the results of the four June CPT Cost Monitor surveys. The results have been adjusted for inflation to March 2026 prices by use of the GDP Deflator.

4.3.2 It will be seen that, after adjusting for inflation, operating costs per kilometre have risen by 4.6% since the February 2025 survey, and by 6.3% since February 2024. Costs per km costs are 20.0% higher than the last pre-Covid year of 2018/19.

4.3.3 Given the differences in timing and sample sizes between the DfT figures and the Cost Monitor survey, direct comparisons between the two data sets need to be treated with some caution – but are useful in pointing to the overall trends.

Table 4-2: Recent Trends in Overall Costs per Km

£ per kilometre, Constant (March 2026) Prices, adjusted using GDP Deflator

Period	English Metropolitan areas	English Shires	England outside London	Scotland	Wales	Great Britain outside London
2018/19 DfT	3.228	2.633	2.838	2.674	2.009	2.761
2021/22 DfT	3.437	2.852	3.052	2.718	2.219	2.950
2022/23 DfT	3.723	3.154	3.268	2.978	2.599	3.180
2023/24 DfT	3.641	3.156	3.321	2.877	2.793	3.214
2024/25 DfT	3.797	3.173	3.378	2.670	2.938	3.224
Feb 23 CPT	3.693	3.347	3.493	3.714	3.174	3.509
Feb 24 CPT	3.267	2.996	3.103	3.276	2.879	3.116
Feb 25 CPT	3.458	3.050	3.146	3.336	2.934	3.169
Feb 26 CPT	3.473	3.223	3.310	3.441	2.964	3.314
% changes						
Since 2018/19	7.6%	22.4%	16.6%	28.7%	47.5%	20.0%
Since Feb 24	6.3%	7.6%	6.7%	5.1%	3.0%	6.3%
Since Feb 25	0.4%	5.7%	5.2%	3.2%	1.0%	4.6%

5. Operating Data

5.1 Overview

5.1.1 Certain operating data was requested from operators, both to assist in the accurate calculation of unit costs, but also to fill gaps in key data such as speeds and productivity with a view to benchmarking and tracking changes over time.

5.1.2 The data requested was:

- Kilometres run
- Diesel (and other fuels) used
- Peak Vehicle Requirement
- Bus Hours operated
- Driver Hours paid
- Staff numbers employed by category
    - drivers
    - engineering staff
    - management and administrative staff

5.1.3 Using these numbers together can provide a useful ongoing picture of the state of the industry looking in particular at:

- Fuel Consumption
- Fleet Utilisation and Speed
- Staff and Productivity.

5.2 Bus Speeds

5.2.1 There was some limited progress in earlier returns, but the latest figures represent a setback. The average speed is measured by the kilometres run divided by the reported bus hours. The figures are shown in Table 5-1 on page 21.

5.2.2 The table shows a deterioration of 3.8% for GB outside London since February 2022. The sharpest falls in speed have occurred in Wales (10.3%) and Eastern England (7.8%).

5.2.3 In the most recent year, between February 2025 and February 2026, speeds fell by 1.6% in Great Britain outside London. There were marginal improvements in East Midlands (0.2%), Scotland (1.2%) and the South West (1.4%). Speeds have worsened everywhere else, with the largest reductions occurring in Eastern England (6.1%) and the North East (5.9%). In London, speeds fell by 3.1%.

5.3 Staff Levels and Productivity

Staff Employed per PVR

5.3.1 This ratio, shown in Table 5-2 on page 22, is a good measure of operators' ability to recruit sufficient staff and then to use them efficiently. In the earlier surveys, many companies were having difficulty recruiting the right number of staff, but this has since eased. Numbers per

PVR have increased in most areas since 2022. The exceptions are the West Midlands, the North West and Yorkshire. During the most recent 12-months, all but two regions saw a fall in the ratio. Scotland saw the largest growth of 9.4%, followed by the Eastern region on 7.4%, West Midlands on 2.7% and London on 1.7%.

Driver Productivity

5.3.2 The number of kilometres run per driver employed is a useful, easily tracked indicator of staff productivity. As measured using DfT's Annual Bus Statistics and now these surveys, this has trended downwards since 2005. There have been several reasons:

- increasing journey times as a result of slower bus speeds (the principal cause)
- allied to this, increases in recovery time to allow for congestion and improve reliability
- less intensive schedules as services are cut
- increased training requirements for safety, disability awareness and CPC.

5.3.3 As can be seen in Table 5-3 on page 23, the deterioration has continued in eight out of the nine surveys, with only June 2025 recording an improvement – but this did not last. Across the whole period, the figure in GB outside London has gone down by 10.1%, from 591 km to 532. In England outside London, there has been a 6.6% fall, from 571 to 533. The figures for the devolved areas were also down, by 16.0% in Scotland, 8.6% in Wales and 3.5% in London.

5.3.4 In the most recent twelve months, five English regions recorded an improvement, the largest being the North East on 6.9%, followed by 5.4% in the East Midlands, 4.6% in the South East, 3.9% in Yorkshire, and 2% in the North West. This drove a 3.0% improvement in the English Shires, offsetting a 3.9% decline in the English Met areas. Elsewhere, there was a substantial 13.2% downward shift in Scotland, and a 3.6% fall in London.

5.3.5 Finally, lest there be any doubt about the correlation between speed and driver productivity, the chart at Figure 9 plots the two variables against one another using the February 2026 survey data. This shows a clear correlation, as the trend line demonstrates

Figure 8: Driver Productivity in Great Britain

Kilometres run per week per driver employed, February 2022-February 2026

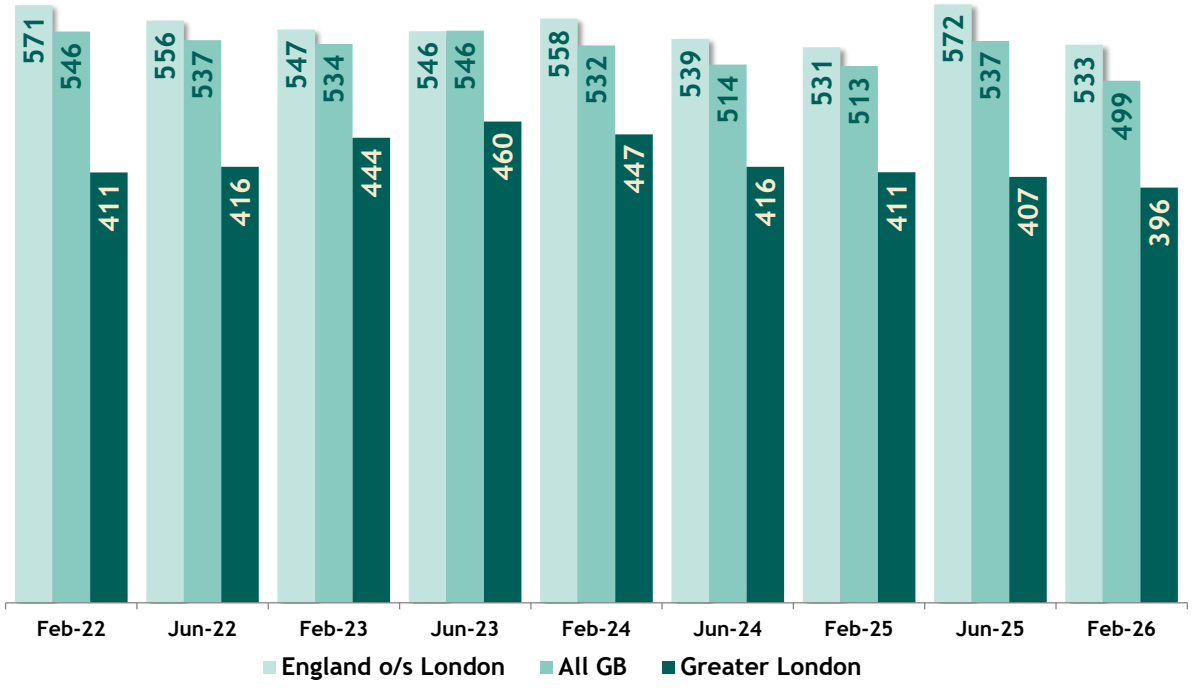


Figure 9: Speed v Driver Productivity by Region and Market Segment

Average Vehicle Speed (mph) v Weekly Kms Run per Driver, February 2026

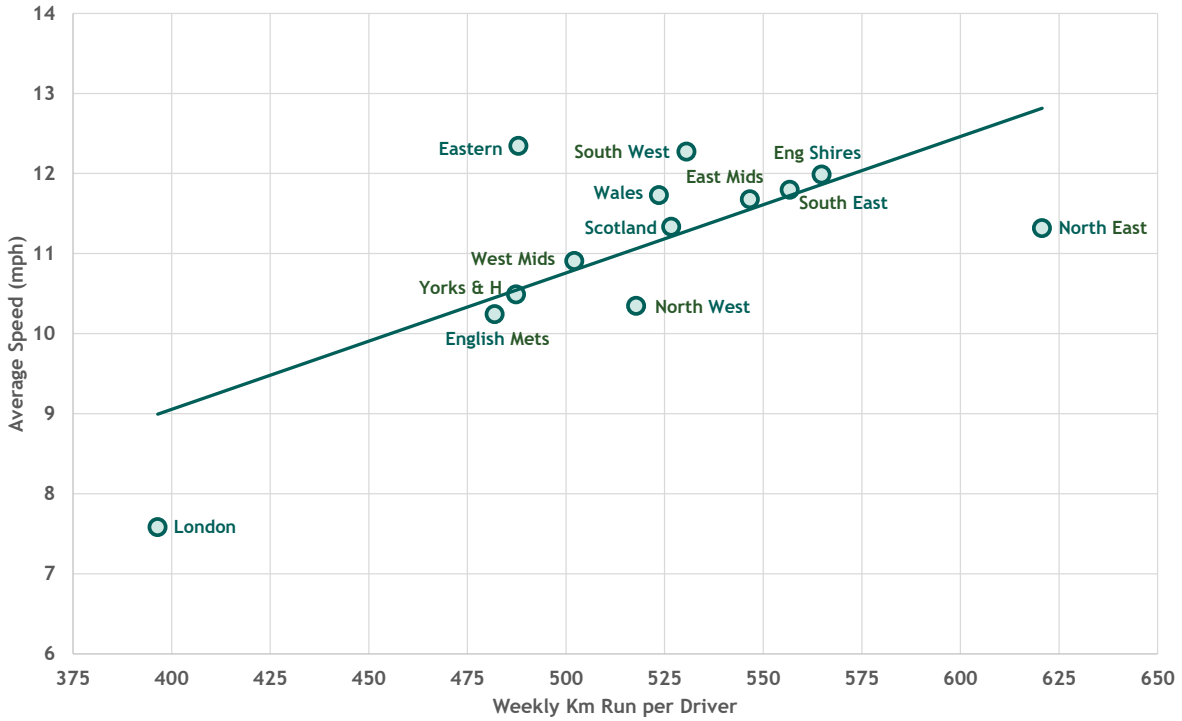


Table 5-1: Bus Speeds

Average Miles per Hour

Region/Sector	Feb-22	Jun-22	Feb-23	Jun-23	Feb-24	Jun-24	Feb-25	Jun-25	Feb-26	Since Feb 22	Feb 25 – Feb 26
English Regions											
Eastern	13.4	14.0	12.5	12.7	13.3	13.0	13.2	12.9	12.3	(7.8%)	(6.1%)
East Midlands	12.0	11.9	11.7	11.9	11.9	11.8	11.7	12.4	11.7	(2.9%)	0.2%
North East	11.3	11.2	11.8	11.0	11.8	12.5	12.0	12.8	11.3	0.1%	(5.9%)
North West	10.1	10.3	10.2	10.3	10.5	10.4	10.6	11.2	10.4	2.8%	(1.6%)
South East	12.0	12.2	12.1	12.0	12.5	12.5	11.8	11.8	11.8	(2.0%)	0.2%
South West	11.6	12.1	12.4	12.6	12.2	12.2	12.1	12.5	12.3	5.5%	1.4%
West Midlands	11.4	11.5	11.1	11.2	11.0	11.0	11.0	11.0	10.9	(4.2%)	(0.8%)
Yorks & Humber	10.6	10.5	11.1	11.0	11.5	10.6	10.6	10.6	10.5	(0.6%)	(0.6%)
England o/s London	**11.3**	**11.3**	**11.5**	**11.6**	**11.8**	**11.7**	**11.5**	**11.8**	**11.3**	**(0.2%)**	**(2.0%)**
Market Sectors											
Greater London	7.2	7.1	7.6	7.8	7.6	7.3	7.8	8.6	7.6	5.8%	(3.1%)
English Mets	10.7	10.3	10.9	10.7	11.2	11.3	10.8	10.8	10.2	(4.0%)	(4.9%)
English Shires	11.9	12.0	12.0	12.2	12.2	12.1	12.0	12.4	12.0	0.7%	(0.4%)
Scotland†	*14.9*	*14.7*	12.2	*14.8*	11.5	11.6	11.2	11.7	11.3	(7.4%)	1.2%
Wales†	13.1	11.9	13.3	*14.4*	12.5	12.9	12.4	12.7	11.7	(10.3%)	(5.6%)
GB o/s London	**11.8**	**11.7**	**11.7**	**12.1**	**11.8**	**11.8**	**11.5**	**11.8**	**11.3**	**(3.8%)**	**(1.6%)**
All GB	**10.5**	**10.4**	**10.5**	**11.0**	**10.6**	**10.5**	**10.6**	**11.0**	**10.3**	**(1.4%)**	**(2.7%)**

† - Figures in italics are not considered representative since they exclude urban operations. They have been disregarded calculating percentage changes. ‡ change since February 2023.

Table 5-2: Staff Recruitment and Efficiency

Total staff employed per PVR

Region/Sector	Feb-22	Jun-22	Feb-23	Jun-23	Feb-24	Jun-24	Feb-25	Jun-25	Feb-26	Since Feb 22	Feb 25 - Feb 26
English Regions											
Eastern	3.19	3.14	3.13	3.21	3.32	3.29	3.36	3.32	3.60	13.2%	7.4%
East Midlands	3.28	3.33	3.54	3.77	3.89	3.78	3.87	3.65	3.66	11.6%	(5.4%)
North East	3.63	3.53	3.73	3.66	3.89	3.85	3.94	3.97	3.82	5.4%	(2.9%)
North West	3.40	3.50	3.56	3.52	3.22	3.48	3.57	3.35	3.35	(1.6%)	(6.3%)
South East	3.27	3.25	3.35	3.47	3.64	3.58	3.66	3.45	3.54	8.3%	(3.2%)
South West	3.01	2.97	3.19	3.03	3.17	3.24	3.33	3.26	3.32	10.1%	(0.5%)
West Midlands	3.39	3.33	3.32	3.37	3.38	3.48	3.20	3.28	3.28	(3.2%)	2.7%
Yorks & Humber	3.17	3.28	3.40	3.43	3.17	3.46	3.63	3.00	3.12	(1.6%)	(14.1%)
England o/s London	**3.35**	**3.33**	**3.48**	**3.40**	**3.47**	**3.56**	**3.54**	**3.38**	**3.43**	**2.5%**	**(2.8%)**
Market Sectors											
Greater London	3.86	3.90	3.56	3.48	3.59	3.70	3.74	3.77	3.80	(1.5%)	1.7%
English Mets	3.47	3.44	3.62	3.49	3.63	3.64	3.53	3.52	3.53	1.5%	(0.2%)
English Shires	3.26	3.25	3.38	3.34	3.35	3.50	3.54	3.31	3.38	3.7%	(4.4%)
Scotland	3.13	3.06	3.62	3.25	3.39	3.38	3.13	3.12	3.43	9.4%	9.4%
Wales	3.38	3.32	3.17	3.04	3.46	3.53	3.68	3.59	3.56	5.4%	(3.4%)
GB o/s London	**3.33**	**3.30**	**3.49**	**3.37**	**3.45**	**3.53**	**3.47**	**3.35**	**3.44**	**3.3%**	**(1.0%)**
All GB	**3.44**	**3.43**	**3.50**	**3.39**	**3.48**	**3.57**	**3.53**	**3.44**	**3.52**	**2.1%**	**(0.3%)**

Table 5-3: Driver Productivity

Kilometres run per week per driver employed

Region/Sector	Feb-22	Jun-22	Feb-23	Jun-23	Feb-24	Jun-24	Feb-25	Jun-25	Feb-26	Since Feb 22	Last Year
English Regions											
Eastern	694	678	636	607	608	598	615	609	488	(29.6%)	(20.7%)
East Midlands	603	595	550	527	529	533	519	575	547	(9.3%)	5.4%
North East	604	589	595	612	594	610	581	631	621	2.8%	6.9%
North West	515	503	490	483	544	494	509	544	519	0.7%	2.0%
South East	601	593	580	565	564	558	532	598	557	(7.3%)	4.6%
South West	565	570	573	587	566	556	536	568	531	(6.0%)	(0.9%)
West Midlands	596	555	546	536	520	498	522	512	502	(15.7%)	(3.9%)
Yorks & Humber	509	504	508	478	538	461	469	560	487	(4.2%)	3.9%
England o/s London	**571**	**556**	**547**	**546**	**558**	**539**	**531**	**572**	**533**	**(6.6%)**	**0.4%**
Market Sectors											
Greater London	411	416	444	460	447	416	411	407	396	(3.5%)	(3.6%)
English Mets	546	516	512	504	512	510	502	507	482	(11.7%)	(3.9%)
English Shires	591	587	576	575	592	561	548	613	565	(4.4%)	3.0%
Scotland†	*777*	*789*	627	*720*	553	578	606	631	527	(16.0%)‡	(13.2%)
Wales	573	544	643	662	577	580	528	566	524	(8.6%)	(0.8%)
GB o/s London	**591**	**579**	**562**	**570**	**558**	**546**	**541**	**580**	**532**	**(10.1%)**	**(1.8%)**
All GB	**546**	**537**	**534**	**546**	**532**	**514**	**513**	**537**	**499**	**(8.6%)**	**(2.7%)**

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