

APPENDIX 4.2
(referred to in paragraphs 2.4, 2.28, 4.10 and 4.13)

National market share by year in the bus industry since 1989

	<i>per cent</i>									
	1989	1990	1991	1992	1993	1994	1995	1996	1997	
FirstGroup*	3.7	5.5	6.3	6.2	6.8	12.8	12.8	19.8	21.6	
Stagecoach Holdings	3.9	3.7	4.9	4.9	6.9	13.4	13.4	16.1	16.0	
Cowie Group/ARRIVA	0.6	0.6	0.6	0.6	0.6	3.5	3.5	14.9	14.8	
British Bus	<u>2.8</u>	<u>3.5</u>	<u>3.4</u>	<u>3.4</u>	<u>3.9</u>	<u>7.9</u>	<u>9.7</u>	-	-	
All major groups	11.0	13.3	15.2	15.1	18.2	37.6	39.4	50.8	52.5	
Go-Ahead Group	1.7	1.7	1.7	1.7	1.7	4.3	4.3	6.2	6.4	
National Express Group	0.0	0.0	6.0	5.9	5.9	7.7	7.7	5.2	5.9	
MTL Trust Holdings	0.0	0.0	0.0	0.0	2.1	3.2	3.2	3.3	3.3	
SB Holdings	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>	<u>0.0</u>	<u>2.2</u>	<u>3.3</u>	<u>3.3</u>	<u>0.0</u>	<u>0.0</u>	
Total second tier	<u>1.7</u>	<u>1.7</u>	<u>7.7</u>	<u>7.6</u>	<u>11.9</u>	<u>18.5</u>	<u>18.5</u>	<u>14.7</u>	<u>15.6</u>	
Total for all groups	12.7	15.0	22.9	22.7	30.1	56.1	57.9	65.5	68.1	
Smaller groups	8.1	8.9	9.1	9.2	7.1	5.5	4.3	2.6	2.7	
Employee-owned	1.7	1.7	3.8	4.2	6.6	3.5	3.8	1.0	0.3	
Management-owned	13.8	16.6	17.2	16.8	17.8	13.0	11.9	9.5	7.5	
Publicly owned	30.4	25.4	18.8	18.1	9.2	7.5	7.5	7.2	6.8	
Scottish Bus Group	5.7	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
London Transport	15.5	15.5	15.4	15.2	15.2	0.0	0.0	0.0	0.0	
Independent operators†	12.0	12.2	12.9	14.1	14.1	14.6	14.6	14.2	14.6	

Source: TAS Bus Industry Monitor 1997.

*Includes Mainline Partnership (1.84 per cent), 20 per cent owned by FirstBus.

†Estimated on the basis of mileage operated on local bus services by operators with small fleets.