Bus passengers have their say

Trust, what to improve and using buses more
March 2016

transportfocus

Introduction

Nearly two thirds of all journeys made using public transport in Great Britain are by bus – making bus by far the most commonly used mode of public transport. Buses play a major part in getting people to work and to education as well as linking communities with shops and essential services.

However, the bus industry is facing serious challenges. The number of passenger journeys in England (outside London) continues to decline while spending pressures on local authorities have resulted in a significant reduction in local authority supported services[1]. The intention of the Government's proposed 'Buses Bill' is to increase bus passenger numbers. The Bill will give local authorities a range of partnership working arrangements, including the option to franchise local bus services.

This makes it all the more important that services are built around the needs of passengers and that their views and aspirations are at the heart of decision-making. An essential part of this is to know what passengers think about existing services and what they want to see improved in the future.

This report is part of that process. It provides a number of pointers for local authorities and the bus industry to both provide a better experience for current passengers and also attract new ones. These should be at the heart of whatever agreement they enter into. The Bill should provide the framework to enable this happen.

We asked over 4500 bus passengers in England (outside London) what they most wanted to see improved, and about their relationship with, and trust in, their bus company. We also asked 2400 less frequent and non-users users of bus services why they did not travel more by bus and what might make them do so.

This report confirms the importance of providing a good 'core product' – a frequent, punctual and reliable service that provides value for money. It also shows that there is real value in companies communicating and engaging with passengers and building up a relationship. Not only could this help in making better decisions but also generate trust and goodwill towards the company when things go wrong.

Transport Focus also carries out the Bus Passenger Survey (BPS[2]) which looks at how satisfied passengers are with their bus journey. Combining our work on satisfaction with this report, on priorities and trust, means that we have gathered the views of just under 45,000 people in the last year. This gives us a very comprehensive and powerful understanding of what passengers experience, want and expect from the bus industry.

We urge bus operators, local transport authorities and central Government to take note of the research findings and work collaboratively to advance the cause of buses and make them better for passengers.

Research methodology

There were two phases of the research work. The qualitative study (conducted by Illuminas) explored how passengers assess the trust they have in the bus companies they use and the level of relationship they have with the company. We carried out 12 focus groups, two each in: Maidstone, Sheffield, Bristol, Reading, Lincolnshire, and Manchester.

The quantitative study (conducted by Populus) asked over 4500 passengers across England their levels of trust in the bus companies they use, and to rank their priorities for improvement among 31 separate aspects of their journey. It also asked around 2400 infrequent/non-users about their views on buses and what might make them travel more. Further details on both research studies can be found at:

- **Qualititative:** www.transportfocus.org.uk/research/publications/bus-passengers-have-their-say-qualitative-report
- **Quantitative:** www.transportfocus.org.uk/research/publications/bus-passengers-have-their-say-quantitative-report

Bus passengers' priorities for improvement simulator tool

Our simulator tool allows you to choose different groups of passengers and see their priorities for improvement; for example you can select by passengers' journey purpose, their age group, or their frequency of bus use.

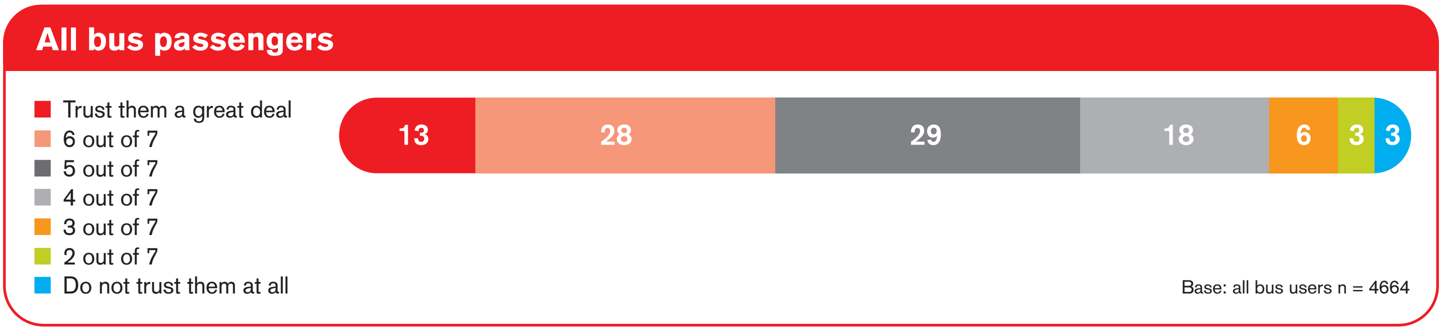
The simulator tool, along with instructions on how to use it, can be found on our website: **www.transportfocus.org.uk/research/publications/bus-passengers-have-their-say-priorities-for-improvement-simulator**

[1] Annual bus statistics: England 2014/15. Department for Transport
[2] BPS: http://www.transportfocus.org.uk/research/bus-passenger-survey

Bus passengers’ trust in bus companies

Trust is an important concept in any business as it can bring loyalty and repeat purchase. Transport is no exception. We know from our work on rail that a more positive relationship with the operator can help to move rail travel from being a ‘distress purchase’ (especially amongst commuters) to more of a conventional customer/supplier relationship. We wanted to mirror this ‘trust’ research with bus passengers.

We asked passengers how much they trusted their bus company. In doing so it became apparent that many passengers have a limited understanding of how bus services are structured, particularly when it comes to what a bus operator is responsible for and what the local authority provides. So to some extent the scores expressed below are a comment on the overall package experienced by passengers.



41% have high trust in their bus company (score of 6 or 7 out of 7)

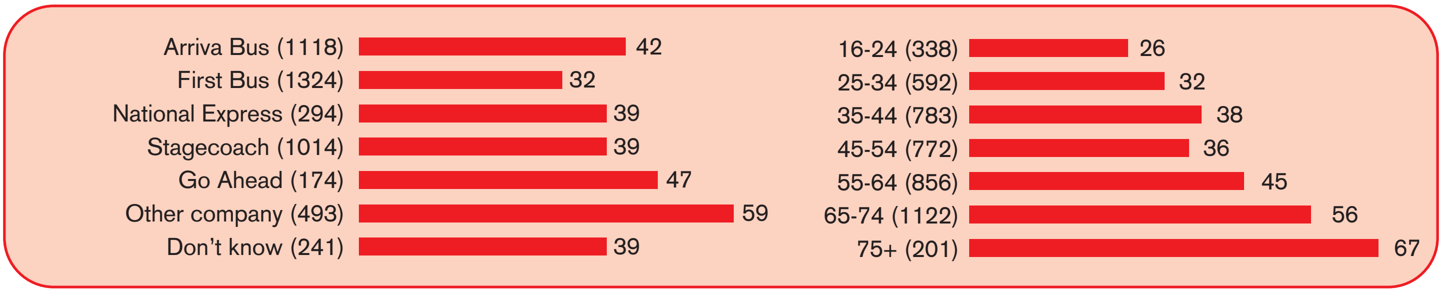
53% have medium levels of trust and most of this is the upper end of middle (score of 3-5)

Very few have ‘no trust at all’ or very limited trust (score of 1-2)

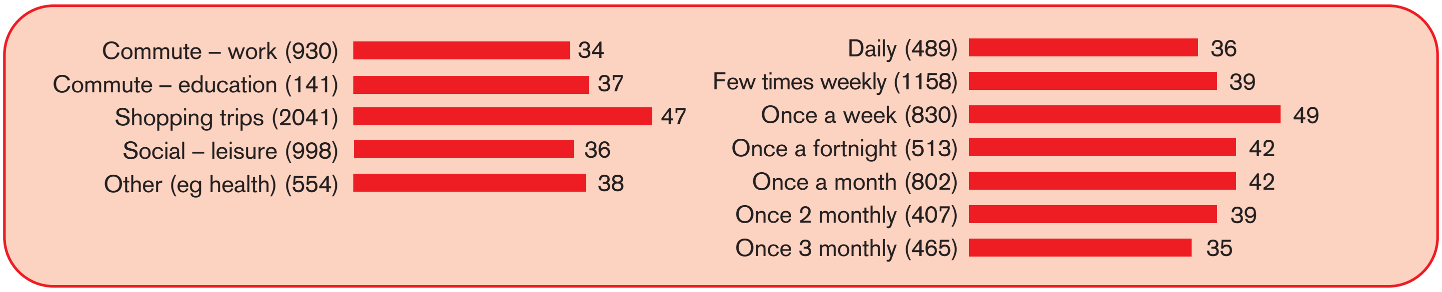
Similar research we carried out among rail passengers[3] showed the range of high-trust scores (score of 6 or 7) was from 52 per cent (Merseyrail) down to 22 per cent (First Capital Connect – now Thameslink). Generally users of long-distance and regional operators had higher levels of trust with users of operators in London and the South East having the lowest levels of trust. But within each category (long-distance, regional, and London/South East) there was a substantial range of scores, showing that some companies are more successful than others at building trust.

[3] *Passengers’ relationship with the rail industry:*
http://www.transportfocus.org.uk/research/publications/passengers-relationship-with-the-rail-industry

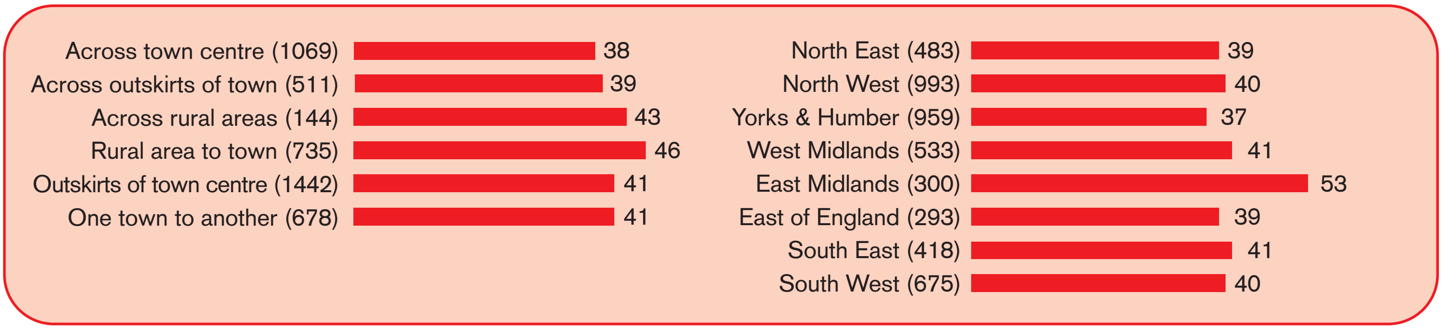
However, levels of high trust do vary. We see a difference amongst the five largest bus groups and more noticeably by age, with the older age groups having higher levels of trust.



It is also slightly higher for those making shopping trips and those travelling once a week but these could in part reflect the age profile of those travelling at these times.



Levels of high trust can also differ by location. Those travelling from rural areas into town display a higher degree of trust, as do those in the East Midlands.



Interestingly, levels of trust do not vary noticeably by social grade nor the length of time spent on the bus.

We wanted to dig a bit deeper into the issue of trust to see what really influences and drives levels of trust amongst passengers. So in the quantitative survey we asked passengers a series of questions about their attitudes to their bus company. We explored the importance these attributes had in building trust. The attributes were grouped into four main themes.

Key themes

Delivering the essentials

Can be relied on to get you where you want to go on time

Can be relied on to turn up when they say they will

Try their best to make the journey a pleasant experience

Provide good value for money

Corporate values

Look like they are professionally managed

Are honest with passengers when there are problems

Give the impression of being good employers

Care about their place in the local community

Passenger engagement

Make it easy for you to stay up to date with timetables and fares

Care what passengers think of their service

Welcome contact from passengers

Use technology well for passengers benefit

Valuing passengers

Have drivers who keep an eye on what's happening on the bus

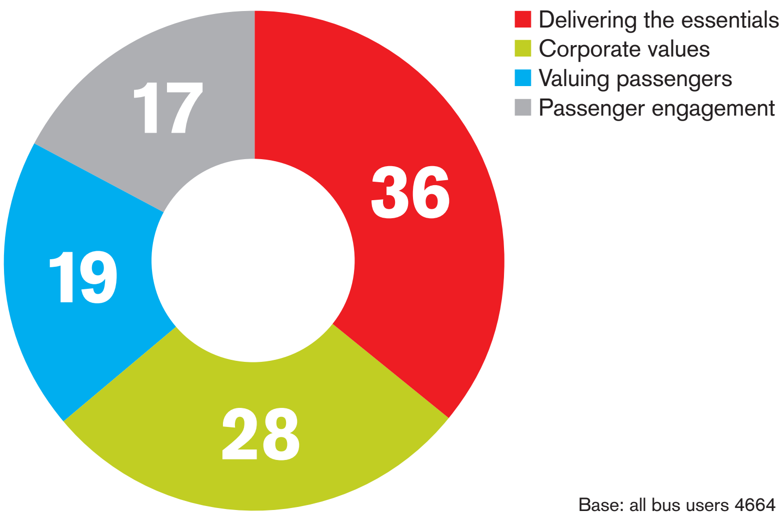
Have drivers who care aboutthe standard of their driving

Have drivers who are considerate to passengers

Do their best for you when services don't run to plan

Show they appreciate you choosing to travel with them

The drivers of trust (%)



Base: all bus users 4664

Using statistical techniques we quantified the impact of each on levels of trust. We found that 'delivering the essentials' had the highest impact on trust (36 per cent – over a third) while delivering corporate values accounted for a quarter (28 per cent). These two combine to drive two thirds of passengers' trust rating.

We also asked passengers how well they thought their bus company did when it came to these 17 attributes – in other words how well it lived up to the statements made.

These are shown in the chart below. Average agreement levels were 48 per cent; those with a tick scored above average, while those with a cross were below average.

Agreement levels

Delivering the essentials

- Can be relied on to get you where you want to go on time ....56% ✓
- Can be relied on to turn up when they say they will ....52% ✓
- Try their best to make the journey a pleasant experience ....51% ✓
- Provide good value for money ....44% ✗

Corporate values

- Look like they are professionally managed ....57% ✓
- Are honest with passengers when there are problems ....44% ✗
- Give the impression of being good employers..42% ✗
- Care about their place in the local community..39% ✗

Passenger engagement

- Make it easy for you to stay up to date with timetables and fares ....53% ✓
- Care what passengers think of their service......44% ✗
- Welcome contact from passengers....................38% ✗
- Use technology well for passengers benefit ......44% ✗

Valuing passengers

- Have drivers who keep an eye on what's happening on the bus ....56% ✓
- Have drivers who care about the standard of their driving ....60% ✓
- Have drivers who are considerate to passengers...63% ✓
- Do their best for you when services don't run to plan..36% ✗
- Show they appreciate you choosing to travel with them....................30% ✗

We can see that bus companies are seen to do better at delivering the essentials. However it is also noticeable that there is higher agreement when it comes to things that are within the control of the bus driver – such as being considerate and driving carefully. This shows the potential value of bus drivers in generating a sense of loyalty and engagement amongst passengers.

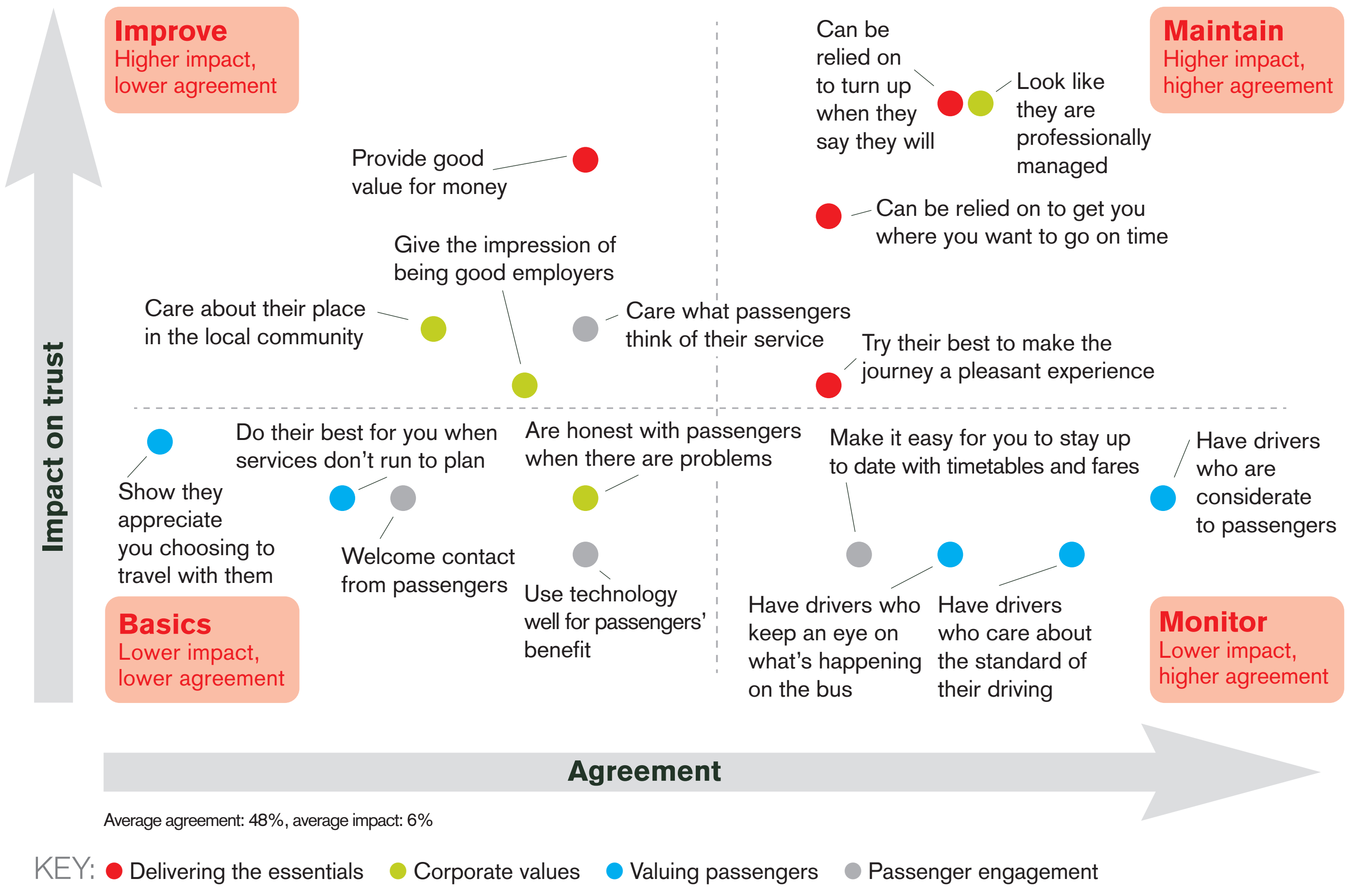
By bringing all this information together we are able to get a sense of what actions could have the biggest impact on levels of trust. These are set out in the chart on the next page. Those in the top left quadrant show areas that have a high impact on trust but where the bus company is not seen as doing well. Those in the top right also show actions that have a high impact on trust but where the company is seen as doing well.

From this we get a picture that shows that reliability (in other words delivering the essentials) must be maintained but that there is much scope for improvement in how the bus company presents itself and engages with passengers.

We also explored the issue of trust in our qualitative research. This too showed a distinction between delivering the core service and the wider corporate/social values.

> "The bus can basically arrive at any point, the timetable is irrelevant in the mornings. So I have to get up and get down there about 20 minutes before I really need to as I can't be late for work."
>
> 18-30, commuter, frequent

How to improve trust



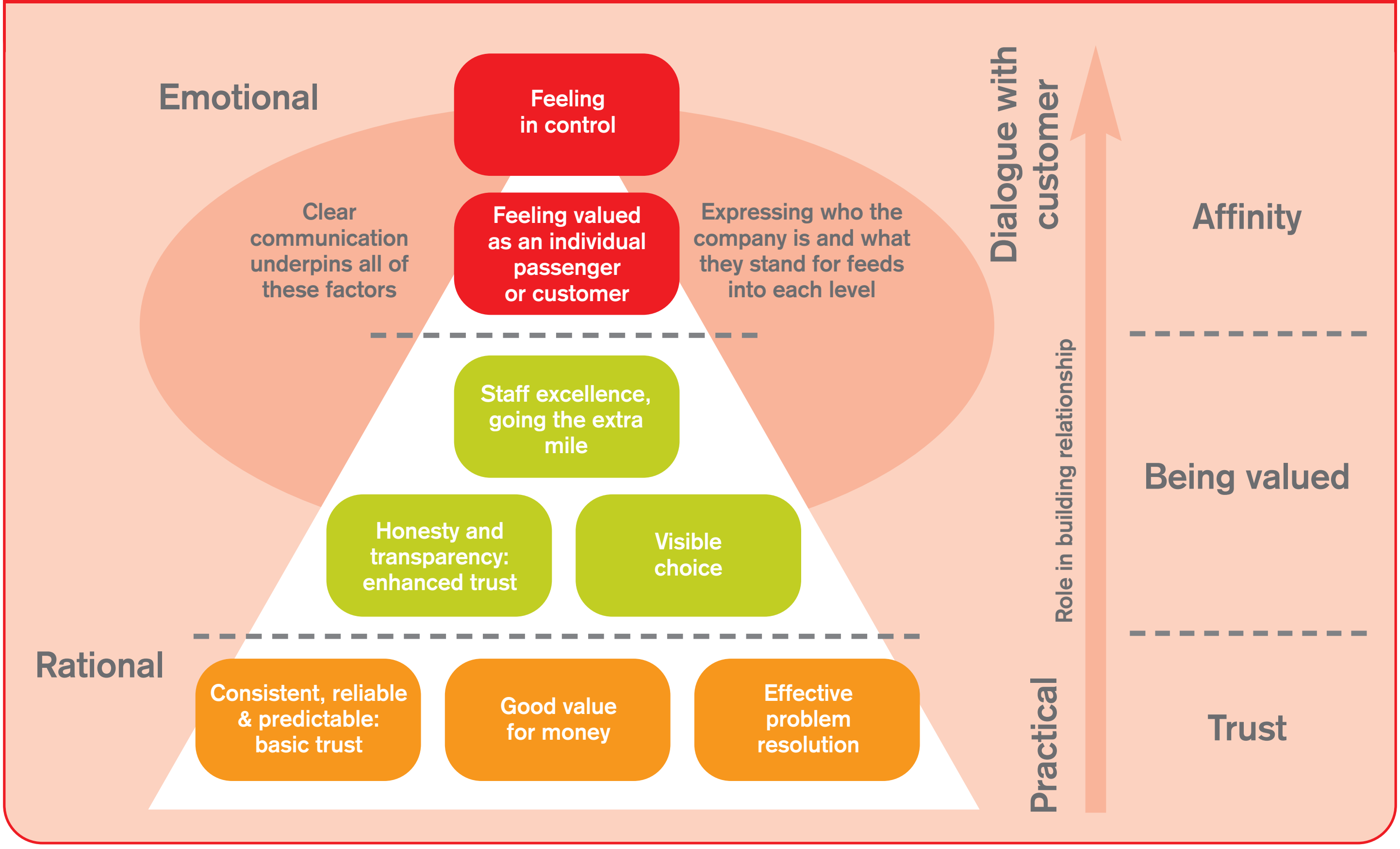
We found that building a relationship with passengers has both a rational and an emotional element. At the rational level it means running the buses on time, being reliable, coping with disruption, resolving problems and offering value for money. Service delivery (in other words delivering the essentials) is at the heart of this rational element.

The better the operator runs the service, the higher the levels of trust generated. Being unreliable or inconsistent has a large detrimental impact on levels of trust.

Trust is the base level that must be achieved before a relationship can be built up between passengers and operators. However, it is the more emotionally engaging factors that build real affinity. This includes things like staff going the extra mile, and feeling like the company really does care what happens to you.

> "I did actually make a complaint because it got to the point where the bus was delayed more and more every day. The reply I got was ridiculous, they just said it was a one-off and not resolved – but that isn't the case – the whole point of writing and what I said is that it wasn't the case – they didn't even read it. I wouldn't bother again."
>
> 18-30, commuter, frequent

Trust hierarchy



We found that bus travel at present is more focussed on the rational elements. There are currently few, if any, emotional benefits experienced by passengers. This occurs for a variety of reasons:

- Under 'business as usual' conditions bus companies show little desire to interact with passengers. Passengers believe that bus companies are not particularly interested in their views on the service – they make themselves remote and aloof. There seems no dialogue at the corporate level, no way to have a conversation (whether complaining or not) and a general view that complaints get 'fobbed off'. The on-bus environment does not make passengers feel like 'customers'.
- When things don't go to plan, bus companies don't communicate particularly well, either while on the bus or for passengers at the stop. Passengers realise a driver who is concentrating on the road will find it difficult to discuss alternatives, but ask why there isn't an alternative source of information (on-board PA, or sources of live information). The 'radio silence' approach leaves passengers unable to assess the alternatives, update work/family on amended arrival times and not feeling in control of the situation.

"You're just a number, they don't care what you think or if you're OK. The driver sees my disabled pass and then speeds away without even checking I've got to my seat. I've fallen over before now, and I don't even know who I would complain to about that. And drivers don't even have a number or anything to identify them even if I could!"

50+, frequent, leisure user, disabled

- Passengers speak of variable experiences from drivers, even from the same driver on different occasions. Many passengers feel there isn't a welcoming exchange when boarding the bus, or appreciation of their custom. Where drivers show empathy with passengers these are seen as 'magic moments' – not just by the passenger it relates to, but also by other people on the bus who see it too. Given the remoteness of the company, the bus driver is largely the only point of contact between the passenger and the operator.
- The value of the driver is also something that comes through our research on value for money (*Bus passenger views on value for money*, October 2013[4]) where drivers are seen as the main source of information on fares and ticketing. Our research suggests that smart ticketing offers opportunities to build trust, both in terms of its ability to offer a 'best fare' guarantee and by offering loyalty schemes that reward passengers. Smart ticketing could provide one of the 'bridges' between the rational and emotional levels of trust.

Building trust is made more difficult by it not being clear to passengers who runs which parts of the bus network, why bus routes run where they do, and at what time services choose to run. This has far-reaching implications:

- passengers don't know who to complain to if there are systemic failings in a bus service, which they find disempowering
- passengers make assumptions on how buses are set up, believing it to be run by a combination of an 'over-regulated' public sector with a 'profit imperative' private sector – arguably the worst possible stereotypes
- one outcome of this knowledge gap is that passengers don't know who they should be 'being valued by' if even they were to be valued. Any value felt is more ascribed to drivers acting as individuals rather than from the bus company itself. Whilst passengers don't want 'chapter and verse' on organisation and structure, they do want clear lines of sight, accountability and sanctions when there is consistent underperformance.

"The bus driver got out of his cabin and helped the disabled passenger into the bus, personally ensuring that they had enough space and were comfortable. I just thought that was great! It really cheered me up and restored my faith in humanity."

30-50, commuter, frequent

"My local bus service is quite unreliable, sometimes I have no way of telling when the next bus will be and it's stressful for me if I need to get to work."

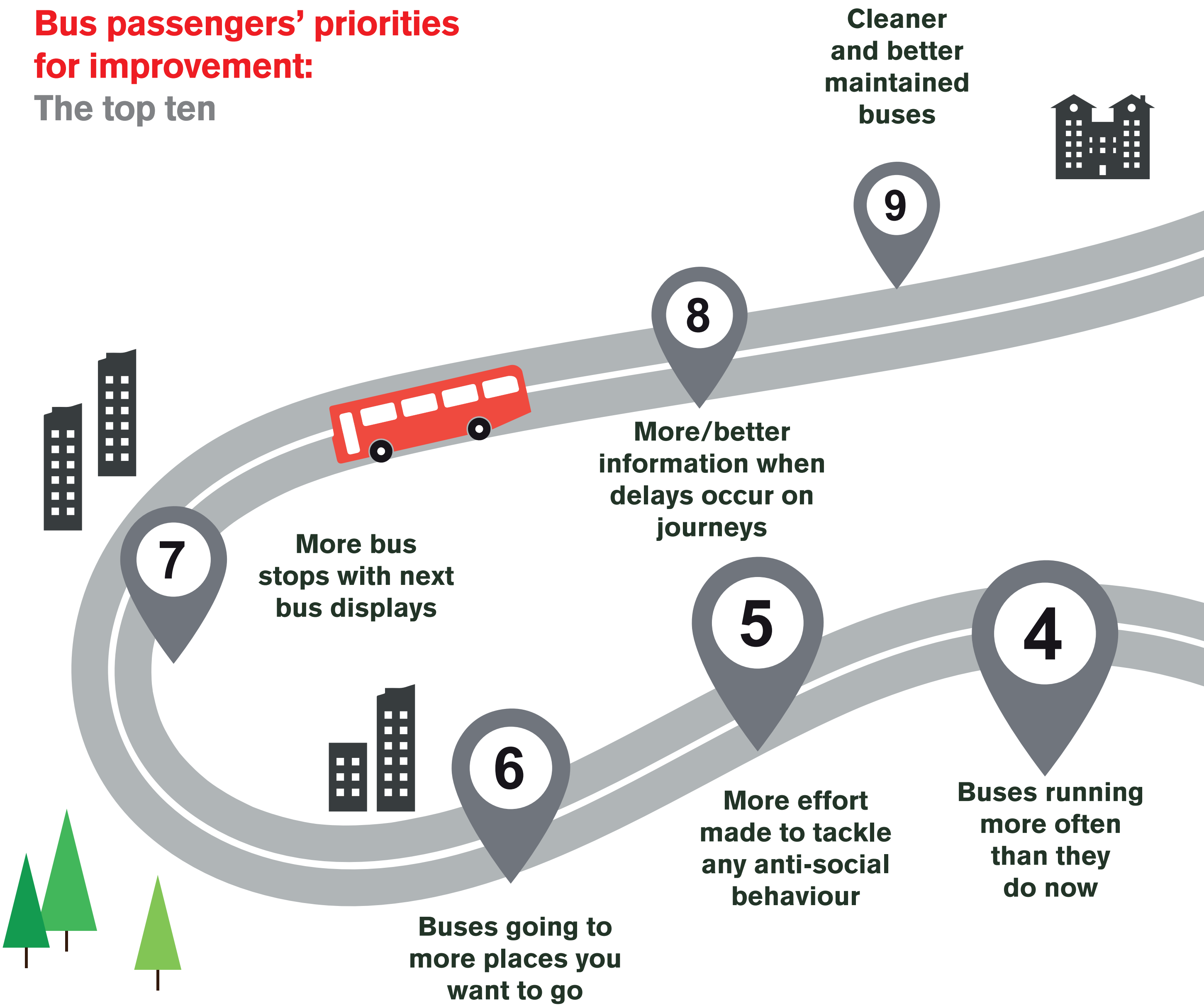
18-30, commuter, less frequent

[4] *Bus passenger views on value for money*, October 2013: http://www.transportfocus.org.uk/research/publications/bus-passenger-views-on-value-for-money

Bus passengers' priorities for improvement

Over 4500 passengers across the country were asked to rank a series of possible improvements to their bus service in order of priority. We can see from the graphic below that the highest priority for improvement is value for money, followed by reliability and punctuality. Interestingly, efforts made in tackling anti-social behaviour came in as the fifth highest priority nationally.

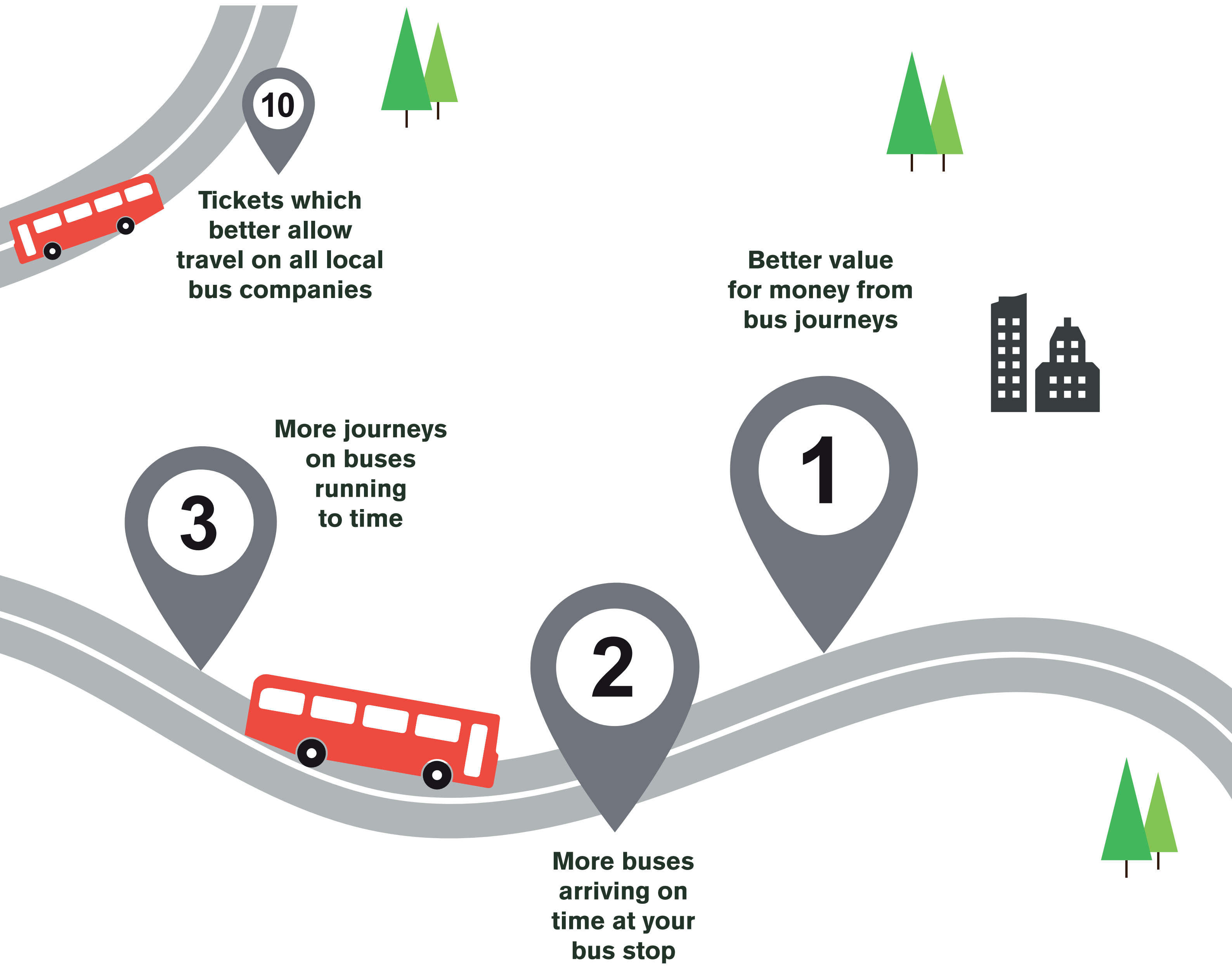
Bus passengers' priorities for improvement:
The top ten



Top priorities for improvement – top ten priorities: all bus users

As well as getting the rank order of priorities, the research also gives a sense of relativity – in other words how much more, or less, important is one factor compared to another. The table on the next page shows the relative scores for each of the 31 different aspects of service we used and their order of importance.

From this we can see that value for money, punctuality and frequency are particularly high priorities.



Bus passenger priorities for improvement

What to improve	Rank	Index
Better value for money from bus journeys	1	258
More buses arriving on time at your bus stop	2	247
More journeys on buses running to time	3	228
Buses running more often than they do now	4	224
More effort made to tackle any anti-social behaviour	5	174
Buses going to more places you want to go	6	158
More bus stops with next bus displays	7	121
Being given more/better information when delays occur on journeys	8	110
Cleaner and better maintained buses	9	107
Tickets which better allow travel on all local bus companies	10	107
Better security at bus stops so people feel safer waiting for buses	11	104
Drivers allowing more time for passengers to get to their seats	12	103
Better quality information at bus stops	13	87
Drivers showing more consideration to passengers	14	86
A smoother ride with less sudden braking or jolting	15	86
A more suitable range of tickets for how and when you use buses	16	78
More buses having next stop announcements/displays	17	74
More personal space on buses (whether seated or standing)	18	74
Free Wi-Fi being more widely available	19	72
Seats being more comfortable	20	69
Shorter journey times on buses	21	66
More seating being made available	22	61
Improved ventilation and temperature control	23	61
Being able to pay for bus travel with smartcards/contactless cards/mobile/apps	24	53
Improved display of route numbers and destinations on the outside of buses	25	52
Drivers communicating better with passengers	26	50
Improved information via apps/online on bus arrival/running times	27	48
Making it easier to step on and off buses	28	46
More space for wheelchairs and buggies	29	44
Better maintained bus stops	30	29
Being able to buy tickets from more places	31	23

Grouped into four ranges: over 150, 100-149, 50-99, up to 49. Base: all bus users 4664

The priorities are shown as an index averaged on 100. So anything ranked over 100 has above average importance and anything below 100 has less than average importance. So for example 150 = 50 per cent more important than average, 300 = three times as important as average, 50 = half as important as average.

Priorities for improvement are reasonably consistent across the major Passenger Transport Executive (PTE) areas with value for money and reliability still scoring highly. However, efforts to tackle any anti-social behaviour was a little higher in Manchester and the West Midlands.

Priorities for improvement by PTE area

	Overall	Rank	Merseyside	Rank	Greater Manchester	Rank	South Yorkshire	Rank	Tyne and Wear	Rank	West Midlands	Rank	West Yorkshire	Rank
Better value for money from bus journeys	**258**	(1st)	**285**	(1st)	**269**	(1st)	**290**	(1st)	**287**	(1st)	**256**	(1st)	**287**	(1st)
More buses arriving on time at your bus stop	**247**	(2nd)	**215**	(2nd)	**233**	(2nd)	**249**	(2nd)	**233**	(2nd)	**229**	(2nd)	**249**	(2nd)
More journeys on buses running to time	**228**	(3rd)	**202**	(3rd)	**218**	(3rd)	**233**	(4th)	**218**	(3rd)	**211**	(4th)	**231**	(4th)
Buses running more often than they do now	**224**	(4th)	**193**	(4th)	**205**	(4th)	**233**	(3th)	**215**	(4th)	**204**	(5th)	**233**	(3rd)
More effort made to tackle any anti-social behaviour	**174**	(5th)	**171**	(5th)	**197**	(5th)	**180**	(5th)	**168**	(5th)	**221**	(3th)	**169**	(5th)
Buses going to more places you want to go	**158**	(6th)	**149**	(6th)	**153**	(6th)	**164**	(6th)	**157**	(6th)	**150**	(6th)	**162**	(6th)
More bus stops with next bus display	**121**	(1st)	**131**	(7th)	**117**	(8th)	**109**	(8th)	**107**	(8th)	**103**	(10th)	**115**	(8th)
Being given more/better information when delays occur on journeys	**110**	(8th)	**110**	(7th)	**111**	(10th)	**106**	(9th)	**106**	(9th)	**106**	(9th)	**108**	(9th)
Cleaner and better maintained buses	**107**	(9th)	**106**	(11th)	**107**	(11th)	**102**	(11th)	**104**	(11th)	**114**	(8th)	**100**	(11th)
Tickets which better allow travel on all local bus companies	**107**	(10th)	**127**	(8th)	**111**	(9th)	**117**	(7th)	**118**	(7th)	**101**	(11th)	**120**	(7th)

Base: PTE base sizes between 435 and 441

There are a significant number of passengers who have a concessionary pass that allows free travel. When we split priorities according to those with a free pass and those without, we see that value for money assumes even higher importance as a priority for improvement among those who pay for their ticket.

Priorities for improvement by ticket type

	Overall	Rank	No free pass	Rank	Have free pass	Rank
Better value for money from bus journeys	**258**	(1st)	**313**	(1st)	**142**	(8th)
More buses arriving on time at your bus stop	**247**	(2nd)	**235**	(2nd)	**271**	(1st)
More journeys on buses running to time	**228**	(3rd)	**223**	(3rd)	**238**	(2nd)
Buses running more often than they do now	**224**	(4th)	**219**	(4th)	**233**	(3rd)
More effort made to tackle any anti-social behaviour	**174**	(5th)	**176**	(5th)	**170**	(4th)
Buses going to more places you want to go	**158**	(6th)	**162**	(6th)	**150**	(6th)
More bus stops with next bus displays	**121**	(7th)	**104**	(10th)	**156**	(5th)
Being given more/better information when delays occur on journeys	**110**	(8th)	**106**	(9th)	**120**	(11th)
Cleaner and better maintained buses	**107**	(9th)	**100**	(11th)	**121**	(10th)
Tickets which better allow travel on all local bus companies	**107**	(10th)	**131**	(7th)	**56**	(23rd)

Base: all bus users 4664, free pass 1685, not free pass 2962

Priorities also differ according to whether passengers have a disability and the impact of that disability. Dealing with anti-social behaviour becomes the highest priority for improvement among passengers whose disability has a big impact on their ability to travel.

Priorities for improvement by impact of disability

	Overall	Rank	High impact	Rank	Low impact	Rank	No impact	Rank
Better value for money from bus journeys	258	(1st)	183	(4th)	212	(4th)	269	(1st)
More buses arriving on time at your bus stop	247	(2nd)	204	(2nd)	245	(1st)	248	(2nd)
More journeys on buses running to time	228	(3rd)	187	(3rd)	221	(2nd)	229	(3rd)
Buses running more often than they do now	224	(4th)	163	(5th)	217	(3rd)	226	(4th)
More effort made to tackle any anti-social behaviour	174	(5th)	230	(1st)	190	(5th)	171	(5th)
Buses going to more places you want to go	158	(6th)	128	(9th)	150	(6th)	160	(6th)
More bus stops with next bus displays	121	(7th)	116	(11th)	113	(10th)	121	(7th)
Being given more/better information when delays occur on journeys	110	(8th)	108	(13th)	105	(13th)	111	(9th)
Cleaner and better maintained buses	107	(9th)	135	(8th)	119	(8th)	104	(10th)
Tickets which better allow travel on all local bus companies	107	(10th)	74	(20th)	85	(15th)	112	(8th)

Base: all bus uses 4664, high impact 142, low impact 495, no impact 489

Priorities for improvement by frequency of bus use

	Overall	Rank	Daily	Rank	Weekly	Rank	Monthly	Rank	Quarterly	Rank
Better value for money from bus journeys	258	(1st)	268	(1st)	257	(1st)	244	(2nd)	275	(1st)
More buses arriving on time at your bus stop	247	(2nd)	262	(2nd)	246	(2nd)	248	(1st)	239	(2nd)
More journeys on buses running to time	228	(3rd)	242	(4th)	226	(3rd)	228	(3rd)	222	(3rd)
Buses running more often than they do now	224	(4th)	246	(3rd)	221	(4th)	225	(4th)	217	(4th)
More effort made to tackle any anti-social behaviour	174	(5th)	155	(6th)	167	(5th)	179	(5th)	192	(5th)
Buses going to more places you want to go	158	(6th)	166	(5th)	157	(6th)	156	(6th)	158	(6th)
More bus stops with next bus displays	121	(7th)	110	(8th)	120	(7th)	125	(7th)	122	(7th)
Being given more/better information when delays occur on journeys	110	(8th)	111	(7th)	110	(8th)	111	(8th)	110	(9th)
Cleaner and better maintained buses	107	(9th)	102	(10th)	108	(10th)	107	(9th)	106	(10th)
Tickets which better allow travel on all local bus companies	107	(10th)	106	(9th)	108	(9th)	99	(10th)	115	(8th)

Base: daily = 489, weekly = 1988, monthly = 1315, quarterly = 872

It is also possible to look at the ranking of priorities according to the levels of trust outlined earlier. Those who recorded low levels of trust placed significantly more importance on service delivery (in other words running a reliable, punctual, frequent service) than did those who recorded high levels of trust. This again reinforces the importance of getting the core product right.

Priorities for improvement by level of trust

	Overall	Rank	Trust (6-7)	Rank	Don't trust (1-2)	Rank
Better value for money from bus journeys	**258**	(1st)	**229**	(1st)	**296**	(3rd)
More buses arriving on time at your bus stop	**247**	(2nd)	**221**	(2nd)	**310**	(2nd)
More journeys on buses running to time	**228**	(3rd)	**203**	(3rd)	**284**	(4th)
Buses running more often than they do now	**224**	(4th)	**191**	(4th)	**311**	(1st)
More effort made to tackle any anti-social behaviour	**174**	(5th)	**190**	(5th)	**150**	(6th)
Buses going to more places you want to go	**158**	(6th)	**144**	(6th)	**187**	(5th)
More bus stops with next bus displays	**121**	(7th)	**126**	(7th)	**95**	(10th)
Being given more/better information when delays occur on journeys	**110**	(8th)	**110**	(11th)	**102**	(8th)
Cleaner and better maintained buses	**107**	(9th)	**117**	(8th)	**92**	(11th)
Tickets which better allow travel on all local bus companies	**107**	(10th)	**98**	(12th)	**113**	(7th)

Base: all bus users n = 4664; high trust = 1913; low trust = 283

Using buses more – users and non-users

Surveying those who use buses gives an important sense of what they think about services and what can improve their journey. But it is just as important to look at people who do not or infrequently travel by bus and, more importantly, why not?

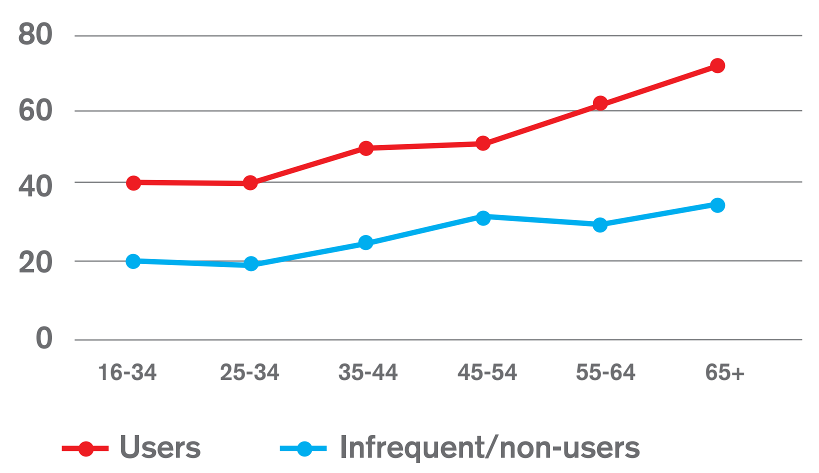
We asked nearly 2400 'infrequent/non-users' about their attitudes to local bus services. Reassuringly 85 per cent of them agreed that

having a good bus network is important to the local area, and nearly half (45 per cent) that travelling by bus is a good way to get about. The research also helps to dispel the perception of bus travel being looked down upon – only a quarter of infrequent/non-users (26 per cent) agreed with the statement that 'people like me do not use buses'. So the value of, and need for, bus services is acknowledged by users and infrequent/non-users alike.

This support for buses does not always translate into a willingness to actually use them. 72 per cent of infrequent/non-users in our survey would not consider making more journeys by bus. However, this still leaves 28 per cent who would and, when coupled with existing bus users who said that they wouldn't mind making more journeys by bus (54 per cent), suggests a reasonable market for growth exists.

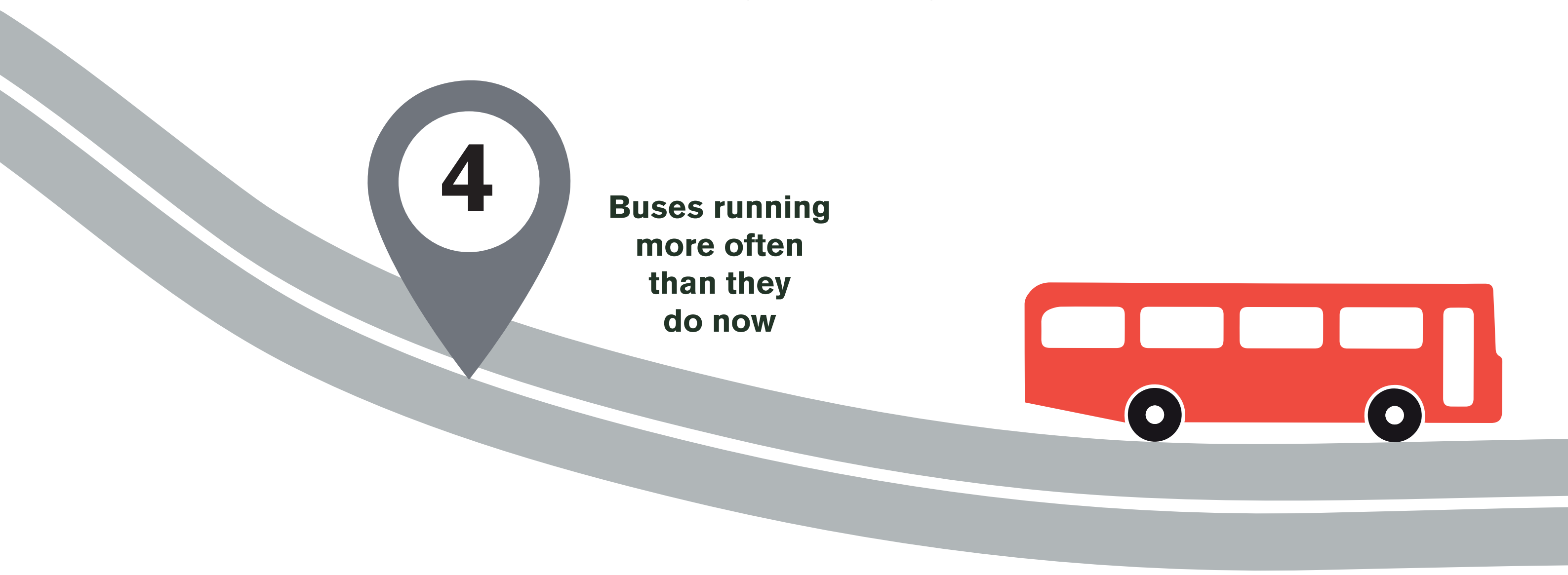
We can see that the willingness to use buses more increases with age.

Would consider using the bus more by age (%)



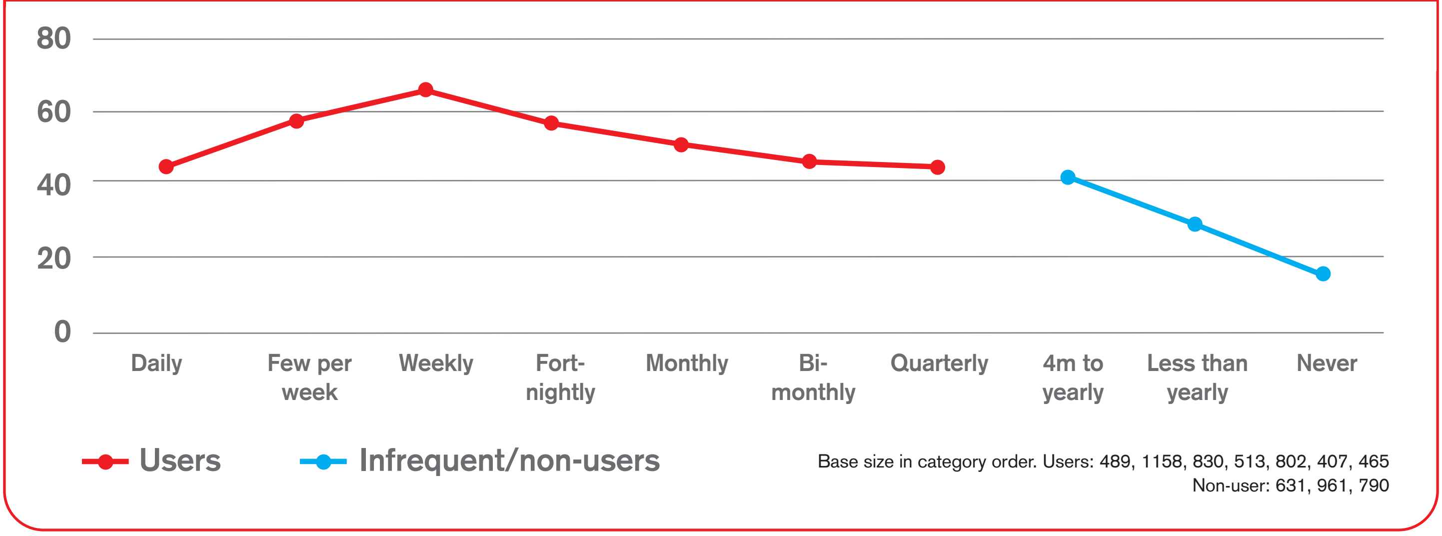
Base in ascending age bands. Users: 338, 592, 783, 772, 856, 1,323,
Non-users 119, 333, 457, 507, 447, 519

It is also highest among users who currently only use the bus once a week, and the more frequent of the infrequent users.



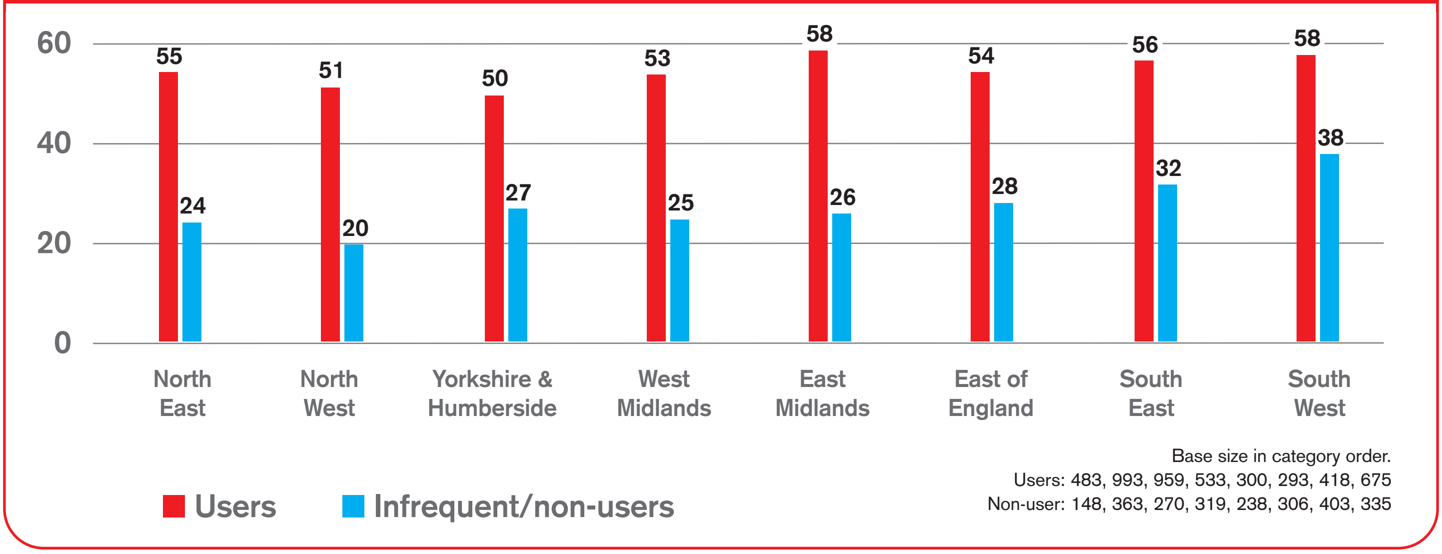
Buses running more often than they do now

Would consider using bus more by frequency of bus use (%)



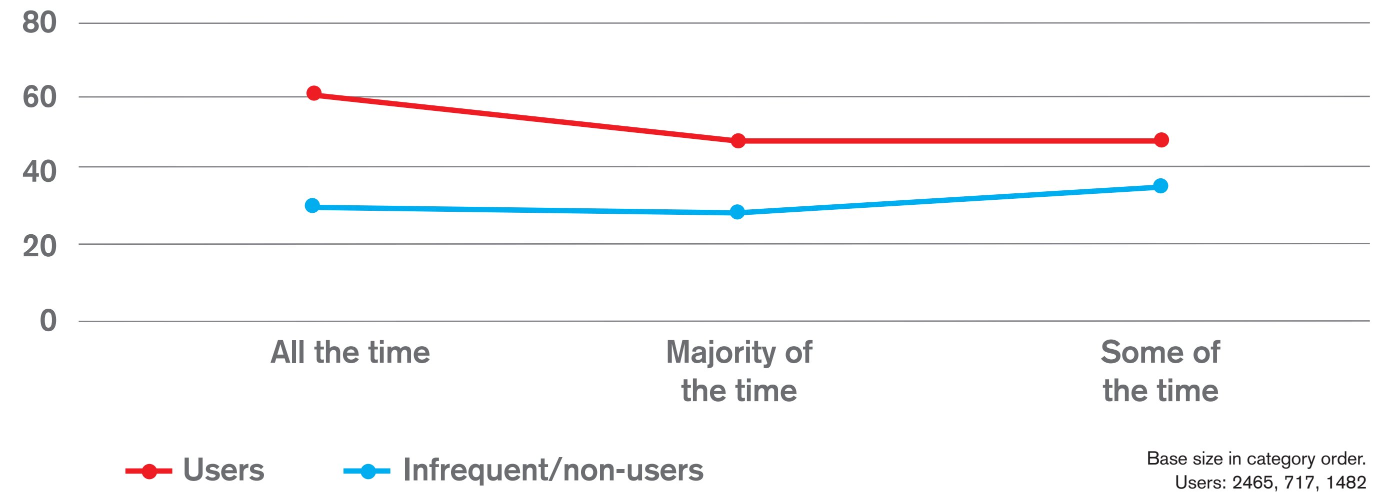
Among users there is limited difference across the regions in willingness to use buses more, ranging from 50 per cent to 58 per cent. However among infrequent/non-users the range varies more widely from 20 per cent to 38 per cent with the South West having most interest.

Would consider using buses more by region (%)



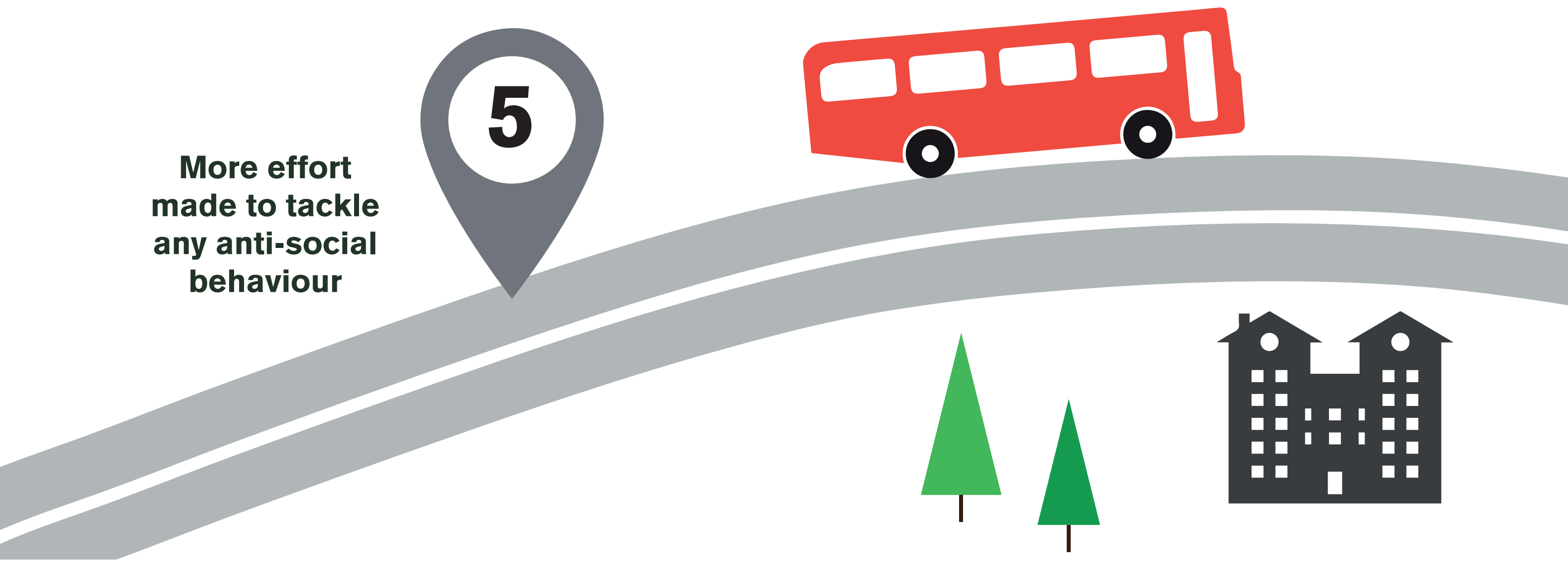
Ownership or access to car clearly has an impact on whether there is interest in using buses more. Availability of a car does not appear to be an unsurmountable barrier. Among bus users the willingness to use buses more peaks for those with a car available all the time (60 per cent). However among infrequent/non-users how often a car is available has a more limited difference.

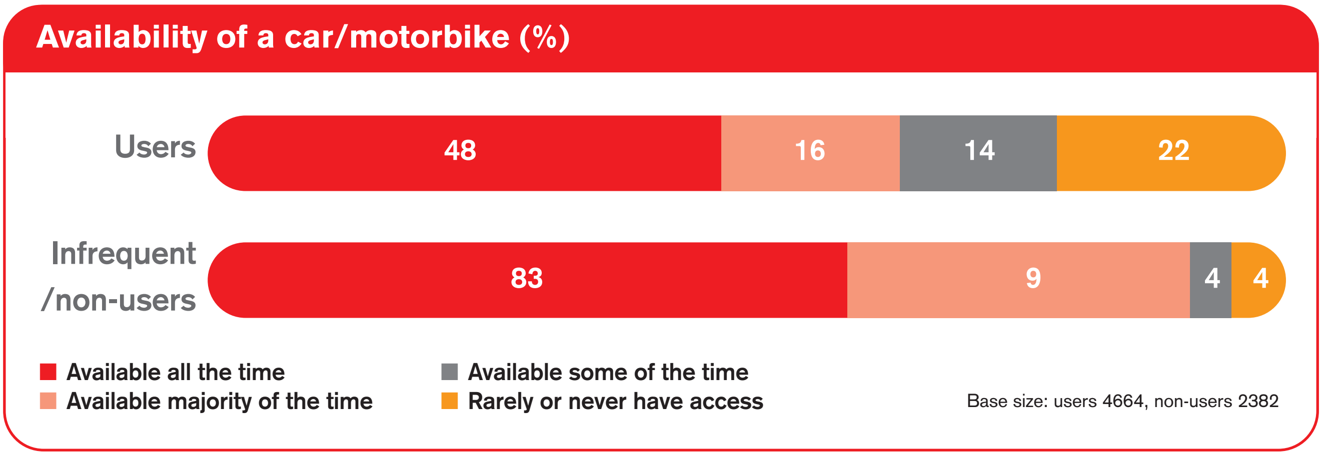
Would consider using buses more by availability of a car (%)



Base size in category order.
Users: 2465, 717, 1482
Non-user: 1981, 213, 188

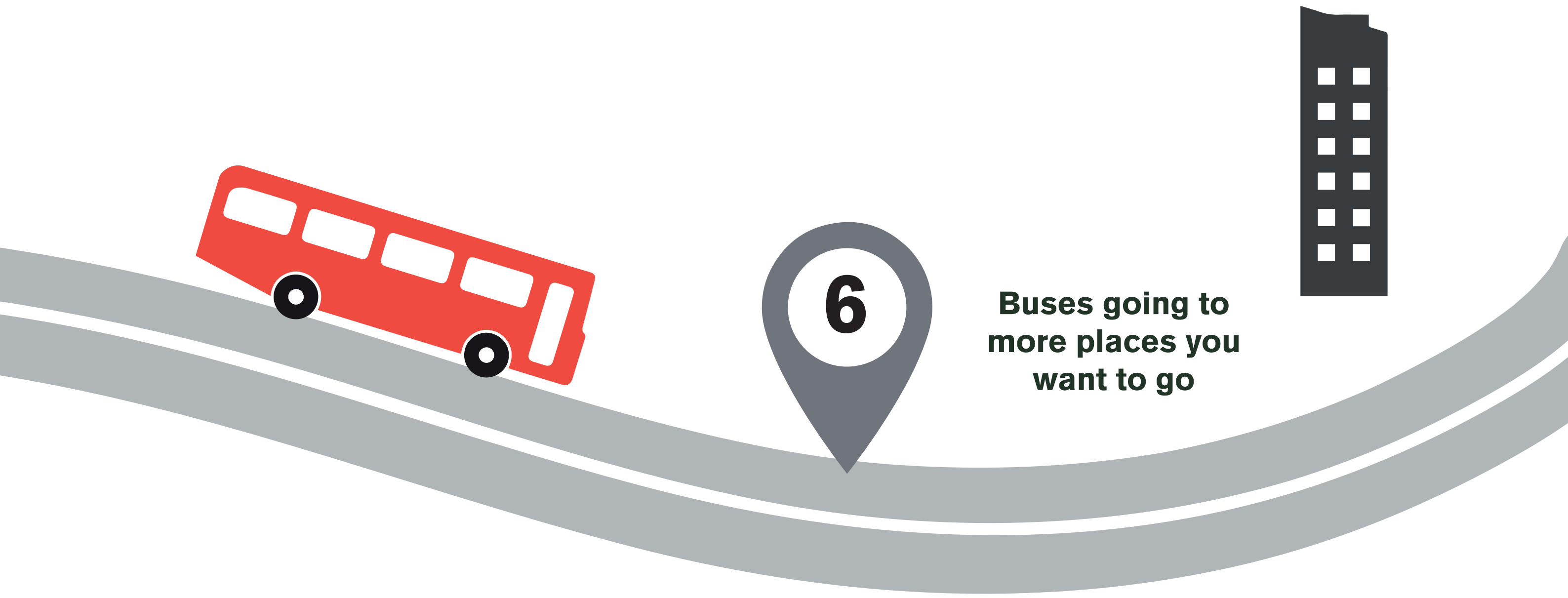
Among infrequent/non-users, 83 per cent always had access to a car while it is only 48 per cent among users.





All of this makes it even more important to understand the barriers to making more journeys by bus – what is it that actually prevents people from doing so? For infrequent/non-users in general the main reasons were very practical; they don't run where or when people want them to (36 per cent), journeys take too long (34 per cent), and cost (23 per cent).

Those practical reasons assume even more significance for those infrequent/non-users who would consider using buses more. Exactly half of them put this mainly down to buses not running where and when they wanted and 38 per cent said that door-to-door journeys take too long. They still feature most for infrequent/non-users who were not minded to use bus more, but notably things to do with the 'on-bus experience', although still secondary, do feature more prominently for this group of people.



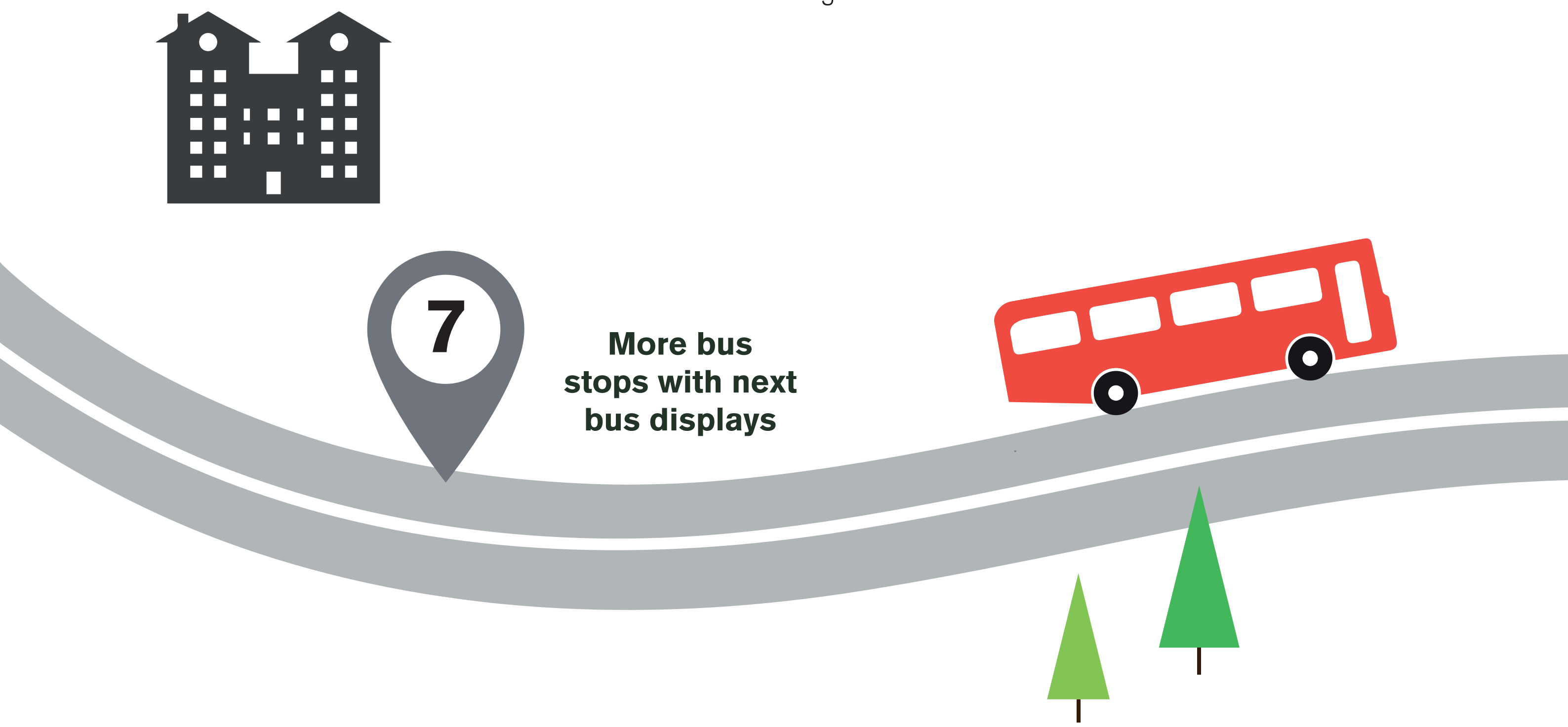
Reasons for not using the bus

		Would consider %	Would not consider %
Don't run where or when I want them to go	36	50	30
Door-to-door journeys would take too long by bus	34	38	32
The cost compared to the alternatives	23	24	23
I do not enjoy time spent on buses	20	8	25
I don't think they are reliable enough	12	9	13
I prefer to travel by car	11	8	12
I am concerned by other passengers' behaviour	7	5	8
I am unable to use buses due to disability	6	4	7
I feel there is insufficient space/comfort on board	6	2	7
No buses/ bus stops in my area	2	4	2
Prefer other forms of transport	1	1	1
Other	5	5	5

Q9. What are your top two reasons for not using buses? Please select up to 2 answers.
Base: all non-users n = 2382. All non-users who would consider n = 671, would not consider n = 1711

So what does all this mean and what needs to happen?

This research sets out what bus passengers want to see improved and how they would like to be treated. This sends a very clear message to bus companies and local authorities when determining local services. It is also highly relevant to the Government as it develops its Buses Bill – it is essential that passengers' needs are at the heart of this legislation.



We have four key recommendations:

1 Deliver the essentials, and do so consistently and professionally

Performance (frequency, reliability and punctuality) is a core requirement. This research shows that it is a high priority for improvement in its own right but is also the bedrock of trust. Passengers trust bus services when there is consistency in delivering the essentials; inconsistent service delivery adversely impacts trust ratings.

Our previous research (*What's the holdup? Exploring bus service punctuality*, December 2014[5]) looked at when, where and why buses are delayed and what can be done to help them run on time. It identified systemic reasons for lateness (adverse traffic patterns, unhelpful parking, unrealistic timetables, driver-changeover times being too tight to be reliable) and variable issues (coping with driver absences, scheduling road works, coping with vehicles going out of service).

We believe there is real benefit in bus operators listening to passengers and, in particular, to drivers, to help identify specific causes of delay. We also want to see better and more consistent use of performance data to identify problem areas.

Value for money is the highest priority for improvement. Cost is also something that represents a barrier to use for infrequent/non-users. This is also something that we have looked at in previous research (*Bus passenger views on value for money*, October 2013).

While better performance will naturally improve perceptions of value for money we found that much more could be done to improve passengers' awareness of fares. Passengers didn't realise what ticket types existed, how they could buy them or where they could find out the information they needed. They relied mainly on word of mouth and the bus driver for information and risked missing out on the best deal. It also begs the question of how much business is lost because potential passengers simply don't know how to use the bus or because people can't find the ideal ticket for their needs.

Our research also shows that smart ticketing can be an enabler of trust. The ability to cap fares helps passengers trust that they have been sold the correct, best-value fare available. It also provides a mechanism on which to bolt some form of loyalty scheme that recognises and rewards passengers for travelling.

[5] *What's the holdup? Exploring bus service punctuality*, December 2014: http://www.transportfocus.org.uk/research/publications/whats-the-holdup-exploring-bus-service-punctuality

Tackling anti-social behaviour was the fifth highest priority for improvement overall, and even higher among those with a disability. It is also something that features in our Bus Passenger Survey which measures satisfaction with bus journeys. This is a complex issue and something that is a wider social issue rather than just a 'bus problem'.

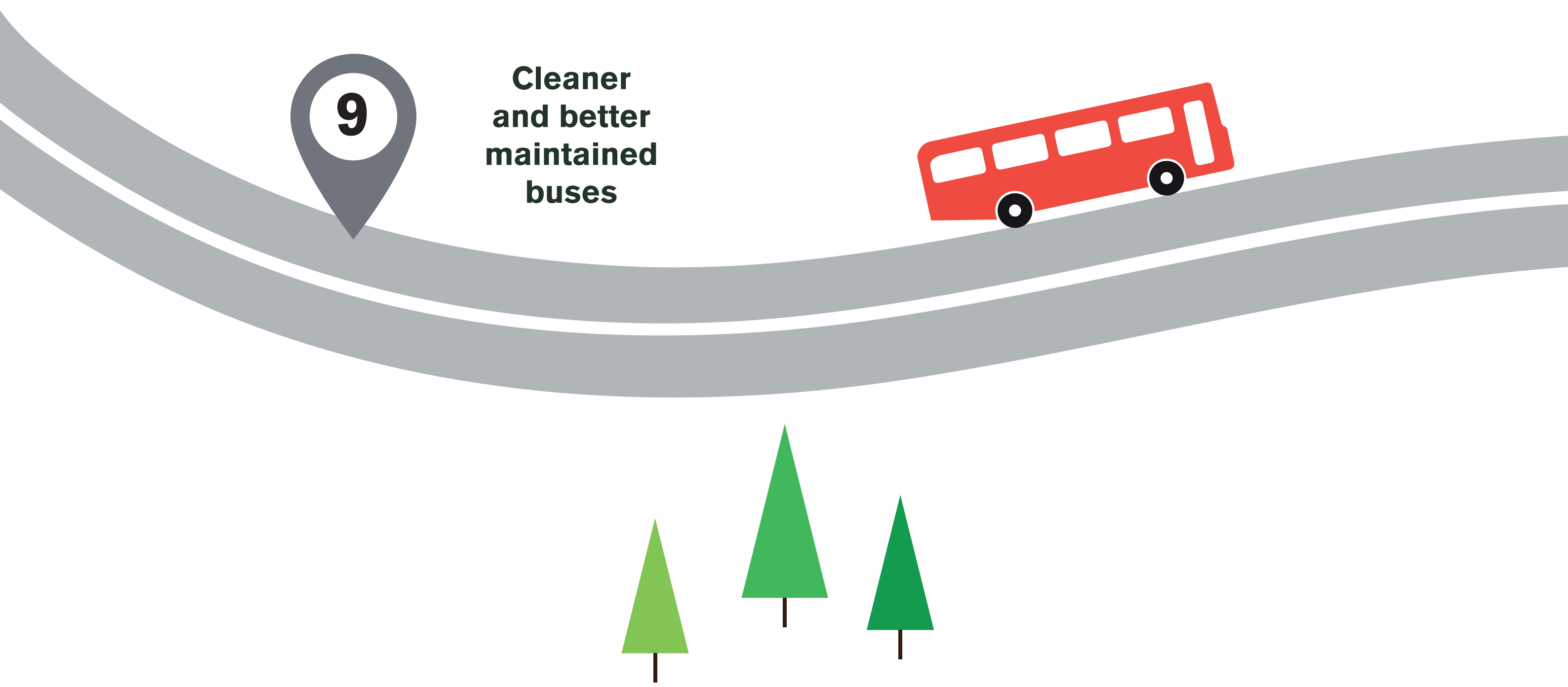
Our initial analysis shows that staff (including drivers) and technology can help provide reassurance but it is something that we hope to investigate further in the coming year.

2 Treat me like a customer

Passengers want providers to be more 'open to a conversation'. It means not being kept in the dark when services don't run to plan (on-bus or before boarding). They want operators to listen to their experiences, they want someone to be accessible for general queries, and they want to know who to complain to. Our research shows that this is a key part to building a good relationship with customers.

Our research (*Bus passengers' experience of delays and disruption*, April 2013[6]) showed that technology was part of the solution. For example fitting public address systems on buses, providing live bus information or even live-chat facilities for passengers to ask questions in the moment.

But it also showed that there is a cultural issue; for example recognising that there are real benefits to the business from engaging with customers. In particular this means making it much clearer and easier to contact the company, either to ask a question or to make a formal complaint, and then to handle that complaint well.



3 Unlock the potential of the driver

Drivers are the face of the bus company. Our research (*Bus driver training – What works? What next?*, July 2015[7]) describes how drivers were seen by passengers as the chief source of information on delays and disruption, as well as the main source of information on the range and price of tickets available. In short, they do much more than just drive the bus.

This new research confirms this feeling. Passengers value drivers who are considerate to passengers and who care about the way they drive. Drivers are also seen as having the potential to provide 'magic moments' – examples of great customer service that passengers notice and which can change attitudes. All of which means that driver recruitment, training and retention assumes even more significance.

4 Boosting demand

This research suggests that there is potential to gain extra business by encouraging occasional users to travel more often by bus. The report also identifies the barriers to this – the need for more buses to more places at the time that passengers want to travel.

We do not underestimate the difficulties in doing this – such services have to be paid for and commercial operators will need to demonstrate a business case, while local authority budgets are also stretched. Nonetheless it is something that bus companies and local authorities must bear in mind when reviewing services.

[6] *Bus passengers' experience of delays and disruption*, April 2013:
http://www.transportfocus.org.uk/research/publications/bus-passengers-experience-of-delays-and-disruption-research-report-april-2013

[7] *Bus driver training – What works? What next?* July 2015:
http://www.transportfocus.org.uk/research/publications/bus-driver-training-what-works-what-next

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