

# Bus Mystery Traveller Survey



## Technical Annex

**April - July 2010/11 (Half yearly results)**

# Bus Mystery Traveller Survey

## Detailed technical survey overview

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## **1. Background**

The Bus Mystery Traveller Survey was set up by the Department for Transport in 2006. The aim of the BMTS was to provide an objective means of recording changes in the quality of local bus services in England outside London.

Since 2006 the survey has been conducted on a quarterly basis in 9 key urban areas in England. These are the six PTE areas plus the three largest non-PTE urban areas outside London.

Responsibility for the survey transferred to Passenger Focus from April 2009. The survey has been conducted since inception by GfK Mystery Shopping. The contract was offered at competitive tender prior to 2009-10 and again prior to 2010-11. GfK have produced this methodology document to support the project.

The survey comprises a sample of bus journeys reflecting the profile of bus use in the main conurbations of England outside London. The sample incorporates a wide range of bus routes, a good geographical spread in each area and samples bus services between 7:00am and 7:00pm.

A trained panel of mystery travellers has been established and they are provided with detailed journey plans specifying the bus stops and times at which to join and alight from each stage (bus trip) in the 'journey'. Each 'journey' or fieldwork shift comprises ten linked bus trips. Journey plans are checked and revised as required prior to each quarter's fieldwork to reflect changes in timetables and services in each geographical area.

The questionnaire is fairly consistent from one quarter to another although a number of changes have been made over time in the light of experience and to address changing needs for particular types of information.

This document outlines the methodology used in the Q2 10-11 survey conducted by GfK Mystery Shopping.

## 2. Sample

### 2.1 Geographical Coverage

The survey is undertaken in nine key urban areas in England. These are the six PTE areas plus the three largest non-PTE urban areas outside London:

1. Tyne & Wear
2. West Yorkshire
3. South Yorkshire
4. Merseyside
5. Greater Manchester
6. West Midlands
7. Nottingham
8. Leicester
9. Bristol

### 2.2 Sampling Procedure

The survey comprises a sample of bus journeys reflecting the profile of bus use in the main conurbations of England outside London. Principal considerations are regional patterns of use, day of week and time of day. The sample incorporates a wide range of bus routes, a good geographical spread in each area and samples bus services between 7:30am and 6:30pm.

121 'bus journeys' each of 10 trips are conducted each quarter, totalling 4,800 individual bus trips per annum. Each 'journey' or fieldwork shift comprises ten linked bus trips. Each shift is designed to take approximately 5.5 hours and the total sample is divided equally between morning shifts (7:30am – 1:00pm) – and afternoon shifts (1:00pm – 6:30pm). Fieldwork is carried out on weekdays only, there are no weekend shifts.

The sample sizes for each area were specified by the Department for Transport and represent an optimum division of the total sample of 1200 bus trips. They broadly correspond with the Department's statistics for local passenger bus journeys undertaken in each of these areas.

The sample per area is as follows:

Area	Bus Trips per quarter	% share
Tyne & Wear	140	12
West Yorkshire	150	12
South Yorkshire	140	12
Merseyside	140	12
Greater Manchester	210	17
West Midlands	240	20
Nottingham	70	6
Leicester	50	4
Bristol	70	6
<b>TOTAL</b>	<b>1210</b>	<b>100</b>

### 2.3 Sample maintenance and revision

Prior to the start of each quarter's fieldwork all journey plans or itineraries are checked with bus service information and timetables on the Traveline website (other websites are used in addition for certain areas). Every bus stop description, departure and arrival times for each bus stage, the bus operator providing the service are compared with website details and revised as required. All sample parameters are held in a central database which is used to generate the individual journey plans or fieldwork itineraries that are issued to mystery travellers. In addition to referencing websites, feedback from mystery travellers who have undertaken the shifts in the previous quarter provides an additional source of 'field intelligence' that the journey planners can draw upon. This feedback is collected in a structured manner via Section 9 of the questionnaire.

Journey planning and maintenance is described more fully in Section 5.

### 3. Assessor recruitment and training

GfK Mystery Shopping has a panel of over 10,000 active mystery shoppers in the UK that is designed to represent all major geo-demographic and ethnic groups. From this large pool we have recruited and trained a specialist panel to conduct the survey in the designated areas.

In view of the fieldwork task, involving half day shifts of 10 linked bus journeys following a precise itinerary, the use of detailed 11 point rating scales for many measures and the need for precision in the measurement of bus departure and arrival times, there are significant benefits in terms of consistency and quality in using a relatively small number of trained and experienced mystery travellers in each area. At the same time, in order to address the inevitable churn over time in such a panel, there is a need to recruit and train a number of new assessors to maintain sufficient capacity and fulfil fieldwork requirements.

Bus mystery travellers are recruited from our main UK panel. This means that they are already trained and experienced mystery shoppers, albeit they may or may not have previous specific experience in the public transport sector. The panel numbers 25-30 assessors across the nine current areas.

#### Initial training

New mystery travellers are provided with a DVD which provides an overview of the survey, together with the 'Assessor briefing notes', the latest questionnaire and an example journey plan. The new recruit takes an online training test comprising a number of multiple choice questions which must all be answered correctly. The test is designed to check the recruit has studied the training materials in a satisfactory manner prior to undertaking in field training.

New recruits are assigned a 'training' journey or shift which they are required to complete and submit full data. This will be a current sample journey for the area concerned so the training fully replicates the actual fieldwork process. Obviously data from 'training' journeys is excluded from actual survey data.

Following successful completion of a training journey and online submission of full data to GfK, which is based on careful inspection of the data collected, a new recruit can be offered journeys for the next wave of fieldwork.

#### Ongoing training / quality management

Once accepted on the assessor panel for this survey, assessors are subject to further quality monitoring on an ongoing basis. This takes two principal forms:

- Scrutiny and analysis of data submitted (assessor variability, bus stage completion rates, etc.).
- In field quality checks – via accompanied visits with Passenger Focus management and GfK Field Quality Auditors.

These procedures are described more fully in Section 8 – Field Quality Management

## 4. Questionnaire and assessor instructions

Mystery travellers are provided with a 'work pack' for each 'journey' or fieldwork shift they conduct. Due to the volume of material, comprising 10 X 18 page questionnaires for a full shift plus Assessor Briefing Notes and Journey Plan/Itinerary, work packs for this survey are delivered by post/courier (however, data is collected via a web-based system).

### Questionnaire

The questionnaire currently comprises 78 questions organised into 8 sections as follows:

#### Section 0: Classification

- Arrival at bus stop
- Scheduled and actual departure times
- Bus type
- Fare payment type

#### Section 1: Bus Stop

- Cleanliness
- Graffiti, etching and vandalism
- Litter
- Condition of Shelter Glass
- Condition of Shelter
- Adequacy of lighting at or around bus stop/shelter
- Timetable up to date
- Countdown Electronic Display
- Other information provided – fares, bus operators, Traveline

#### Section 2: Bus Exterior

- Route number / destination information – type and clarity

#### Section 3: Boarding the Bus

- Whether bus obstructed
- Closeness of bus to kerb
- Closeness of bus door to stop
- Any congestion due to other buses

#### Section 4: The Driver

- Issued correct ticket
- Records boarding electronically (non-cash trips)
- Question to driver
- Helpfulness
- Appearance
- Speak clearly, easy to understand

#### **Section 5: Bus Interior**

- Availability of seating
- Cleanliness of seating
- Condition of seating
- Cleanliness of windows
- Graffiti
- Etching on Windows
- Litter
- Litter bins
- Customer Information and PA announcements

#### **Section 6: Quality of Ride**

- Appropriateness of Speed
- General smoothness of Ride

#### **Section 7: Bus Exterior**

- Route number/destination information – type and clarity
- Cleanliness
- Graffiti

#### **Section 8: Alighting from the bus**

- Whether bus obstructed
- Closeness of bus to kerb
- Bus licence number
- Bus vehicle registration number
- Time alighted from bus
- Whether on time, late or early
- Reason if later or earlier than schedule
- Anti-social behaviour by other passengers
- Driver action if any anti-social behaviour



- Driver behaviour
- Overall satisfaction

Section 9 provides the mystery traveller with the opportunity to comment on the journey plan/itinerary provided for this shift. So if they experience any problems in completing that bus stage which they believe relate to the information contained in the journey plan – bus company or number, information relating to either boarding or alighting – they can supply details. This feedback is used when the journey plans are reviewed and revised for the next wave of fieldwork.

The complete questionnaire is included as Appendix 1.

#### Assessor Briefing Notes

Mystery travellers are provided with written instructions on how to carry out the survey and to submit results online. This is updated as required for each wave of fieldwork. Mystery travellers also receive complementary communications highlighting any changes to questionnaire or survey procedures prior to the start of each wave. If there is a need for specific communication to all mystery travellers during fieldwork, a bulk email can be issued almost immediately.

The Briefing Notes cover the following topics:

1. Background
2. Overview
3. Timings
4. Journey Plan
5. Preparing your route before you set off
6. Measuring bus punctuality
7. Paying your bus fare
8. Rotation of lower and upper deck assessment
9. Route terminated before advertised destination
10. Emergencies and delays
11. Challenges from bus operators
12. Completing the assessment and questionnaire correctly
13. Reporting results online
14. Problems and feedback

The full assessor briefing notes are included as Appendix 2

### Journey Plan/Itinerary

In the work pack provided for each journey or shift, mystery travellers are provided with a detailed itinerary which specifies the bus stops and times of departure and alighting for each of the ten bus trips comprising the shift.

Mystery travellers are instructed to study the journey plan carefully at home in advance of carrying out the fieldwork shift. The importance of preparation and familiarisation with the journey plan is stressed in order to facilitate locating all the bus stops involved and to enable attention to be focussed on assessing the bus stops, recording departure and arrival times of each bus, and all of the other survey measures in the questionnaire.

The journey plan contains the following information for each of ten trips:

- Bus company
- Bus Number
- Direction
- Destination
- Departure bus stop description
- Scheduled departure time
- Alighting bus stop description
- Scheduled alighting time
- Time interval before next bus after scheduled departure is scheduled to depart (i.e. service frequency)
- Grid references for bus stop locations
- Additional information to assist with navigation of the route
- Time interval between alighting time and departure time of next bus stage, i.e. time available to get to the next stage departure bus stop.

A sample journey plan is included as Appendix 3.

## 5. Journey planning and maintenance

Each journey or shift comprises ten linked bus trips that the mystery traveller must complete. The journey plan is therefore a vital document that enables the fieldwork to be carried accurately and efficiently. However, since bus services and timetables are subject to change, all journey plans must be checked and revised on a systematic basis.

All journey planning, checking and revision is conducted by GfK. We draw upon the experience and feedback of mystery travellers via Section 9 of the survey questionnaire. However, the principal source of bus service/ timetable information we use is the Traveline website. Bus operator sites are also used to a more limited extent.

Constructing a complete journey of ten linked bus trips from scratch is a substantial task in many instances. GfK worked with the Department for Transport to create the 121 journeys (1210 bus trips) that comprised the original sample involving pilot surveys to assess accuracy and feasibility in terms of fieldwork completion.

Over the period that the survey has been conducted the journey plans have been checked and revised on a quarterly basis so that they are as up to date as possible at the start of each wave of fieldwork. The volume of changes is wholly dependent on changes to bus services and timetables area by area.

Every bus stop description, departure and arrival times for each bus stage, the bus operator providing the service are compared with website details and revised as required. All sample parameters are held in a central database which is used to generate the individual journey plans or fieldwork itineraries that are issued to mystery travellers.

Journey planners work according to the following guidelines:

- A journey must comprise 10 separate trips
- As far as possible a journey should follow a circular pattern so that the last stage returns the mystery traveller to their start point or in reasonable proximity.
- Each bus stage should be of approximately 10-15 minutes duration
- A gap of at least 10 minutes should be allowed between alighting one stage and boarding the next, although the time will obviously depend on the distance between the two bus stops involved.
- Bus route numbers should not replicated in the same journey unless unavoidable.
- Bus stops should not be replicated in the same journey unless unavoidable.
- Journeys are either morning shifts (7:30 am – 1:00pm) or afternoon shifts (1:00pm – 6:30pm).

## 6. Fieldwork

### Fieldwork dates

April-May fieldwork was conducted from 19<sup>th</sup> April to 28<sup>th</sup> May. June-July fieldwork was conducted from 7<sup>th</sup> June to 16<sup>th</sup> July.

### Anonymity

The survey is conducted as a covert mystery shop exercise. A trained panel of assessors act as 'mystery travellers'. So as not to influence any aspects of performance measured in the survey, they are briefed to behave as normal members of the travelling public whilst waiting at bus stops and travelling on buses or interacting with bus drivers. They do not introduce themselves or 'sign in' with bus drivers or other bus operator staff they may encounter.

### Method of administration

Assessors are briefed to operate in a covert manner as far as possible. Their briefing notes explain that we want to avoid bus operators knowing which routes are assessed in this survey and that they must try to avoid being detected by bus company staff.

Questionnaires are provided so as to be easily carried within a filofax. Assessors are encouraged to "personalise" the filofax with stickers, etc. so as to deflect attention from what they are writing down inside it.

Assessors are further briefed on the following points:

- That bus drivers make extensive use of their rear view mirrors and that they should be particularly discreet after alighting and recording details about the back of the bus.
- If a crew member or other bus company staff member enquires what they are doing, just tell them politely that it is private. If they are insistent, assessors are provided with a letter of authority that they can show bus company staff.

### Buying cash tickets

The sample is divided evenly between journeys where assessors pay their bus fare by cash - buying individual tickets for each stage - and journeys where they use a day pass. The method of fare payment is specified for each stage in the field documentation provided to assessors.

When not paying cash, the assessor must note and record whether the bus driver records their boarding of the bus.

### Measuring bus punctuality

Measuring whether a bus service is running on time, late or early is based on recording actual departure times from stops and comparing these with scheduled times sourced from Traveline or operator websites. Accurate recording of actual times is essential and assessors must use an accurate watch/timing device which has been set to the correct time from the radio or TV teletext prior to commencing each shift. Assessors record only the hour and minute and are instructed not to round up (i.e. 10:42 and 45 seconds should be recorded as 10:42).

Bus departure times are recorded twice for each stage; first the time of departure from the stop where the assessor boarded the bus and second the time of departure from the stop where the assessor alighted that stage.

In most cases the assessor records the scheduled time for departure from the boarding stop (which is provided in their journey plan documentation for each stage). The journey plan also provides the scheduled departure time for the next bus on the service concerned and, if the scheduled bus has been missed, the assessor is instructed to record the time of the next scheduled bus. However, in order to ensure accurate measurement, in the event that the assessor has been delayed during a prior bus stage of the shift to such an extent that he/she arrives at the boarding stop after both the first and second scheduled departure times, the assessor indicates that they were unable to record the scheduled departure time. In all cases assessors record the actual time of departure from the boarding stop.

To clarify further the bus time data, assessors record whether they caught the scheduled bus service or an earlier or later bus and the reasons for deviating from the scheduled service.

Assessors record times in a similar manner at the alighting stop of each stage. They record the time the bus departs from the stop at which they alighted and this is compared with the scheduled time.

A margin is allowed in the definition of both late and early departures compared with scheduled times:

- Later than scheduled is at least 6 or more minutes after the scheduled time.
- Earlier than scheduled is at least 2 or more minutes before the scheduled time.

Assessors record the reasons, if known, for late or early departure.

### Rating scales

Whilst bus punctuality is measured by recording departure times from stops as described above, other aspects of service performance are quantified principally through the use of 11 point rating scales (marks out of 10). Each scale includes suitable descriptors for different scale points relating to the aspect of performance concerned.

Rating scales have generally remained consistent since the survey was introduced with only minor revisions to descriptors for a small number of measures. Until the start of the 2010-11 survey in April 2010, the rating scales were presented horizontally, i.e. across the page with Zero score on the left and 10 on the right. From this date the format was changed and the scales are now displayed vertically, i.e. down the page starting with Zero and ending with 10.

Assessors were briefed to use the vertical scales and evaluate each aspect in the same manner as they had done with the previous horizontal layout.

11 point scales are used for the following measures:

#### Section 1: Bus Stop

- Cleanliness
- Graffiti, etching and vandalism
- Litter
- Condition of Shelter
- Adequacy of lighting at or around bus stop/shelter

#### Section 2: Bus Exterior

- Clarity of Route number / destination information

#### Section 3: Boarding the Bus

- Closeness of bus to kerb
- Closeness of bus door to stop

#### Section 4: The Driver

- Helpfulness
- Appearance
- Records boarding electronically (non-cash trips)

#### Section 5: Bus Interior

- Availability of seating

- Cleanliness of seating
- Condition of seating
- Cleanliness of windows
- Graffiti
- Etching on Windows
- Litter

#### Section 6: Quality of Ride

- Appropriateness of Speed
- General smoothness of Ride

#### Section 7: Bus Exterior

- Clarity of Route number/destination information
- Cleanliness
- Graffiti

#### Section 8: Alighting from the bus

- Closeness of bus to kerb
- Time alighted from bus
  
- Satisfaction with the overall service on each bus stage

This is also scored out of 10 “where 10 means you are completely satisfied and 0 means you are completely dissatisfied” (this text is used instead of a full 11 point scale with descriptors for different scores).

#### Retention of records

All data is submitted online by assessors and captured electronically on our system. All data is retained in this system from the start of the survey in 2006.

Survey documentation such as questionnaires, assessor briefing notes, journey plans for each wave are also held electronically since the start of the survey.

#### Regular fieldwork status updates to Passenger Focus

Each year fieldwork takes place in four quarterly waves starting in April and completing in the following February. This report refers specifically to the first half of 2010-11 covering the first two waves April-May and June-July.

During each fieldwork period GfK provides Passenger Focus with a weekly status report by area confirming the number of completed bus trips, the reasons for any individual trips not completed and the number of shifts that are in field or to be allocated to assessors.

## 7. Fieldwork completion rates

### Bus stage completion by Area and Total

All 121 journeys comprising the sample are attempted each quarter. However, for a number of reasons individual bus trips within a journey may not be completed, e.g. buses not turning up/running very late/full. The level of completion is monitored continuously during fieldwork and the reasons for individual trips not being completed are logged. As noted in the analysis of compliance with scheduled journey times, 8% of buses are reported as departing more than 10 minutes later than the scheduled time.

The table below shows the completed trips for Q1 & 2 10-11 by area and in total:

696225 PFO 12368	Bus JOURNEYS COMPLETED	COMPLETED BUS TRIPS	% COMPLETE
Greater Manchester	42/42	416/420	99%
Merseyside	28/28	264/280	94%
South Yorks	28/28	244/280	87%
Tyne & Wear	28/28	259/280	92%
West Midlands	48/48	471/480	98%
West Yorks	30/30	292/300	97%
Bristol	14/14	138/140	99%
Notts	14/14	139/140	99%
Leics	10/10	100/100	100%
total	242/242	2323/2420	96%

### Reasons for non-completion

Because journeys comprise 10 linked bus trips, any problems with an individual stage, e.g. the bus arrives late or it does not arrive at all, means that the mystery traveller needs to take decisive action to catch a bus that will enable the rest of the journey trips to be completed successfully.

In terms of survey management it is important to distinguish between problems experienced with completing bus trips that are simply due to service performance on the day concerned – which are largely unavoidable – and problems with timetable changes or other information provided in the journey plans that has become outdated.



As described in Section 5, all journeys are checked and revised if required prior to each wave of fieldwork. Mystery travellers provide feedback on any problems they experience where the information in the journey plan does not match the actual conditions encountered on the bus routes concerned. This feedback is used during the journey plan checking and revision work that is carried out before each new wave of fieldwork. However, if there is a conflict between information provided by a mystery traveller and the information on the Traveline website, we would normally treat the latter as the most reliable source and use this for the journey plan concerned. Whilst this may not always lead to the most accurate journey plan, we feel that, generally, there would be greater risk in using the mystery traveller's instructions when these are not corroborated by Traveline.

#### Compliance with scheduled journey times

Based on analysis of Q4 09-10 data, in 8% of cases buses departed more than 10 minutes later than the scheduled time, which is probably the threshold for having an impact on completing the next stage. It may be necessary to catch a different bus in order to get to the departure point for a subsequent stage and catch the scheduled service, i.e. 'to get back on track'.

There is a notional target of 95% completion of trips across the 1210 expected per quarter and that any trips not completed are distributed across the survey areas and journeys. Where a journey has usually 5 or more trips not completed, it would be a requirement (conditions permitting) to conduct a replacement journey either in full or part to ensure the evenness of bus route coverage is maintained.

## **8. Data capture, verification and validation**

#### Description of online data entry by assessor

Assessments are recorded in the field on paper questionnaires. Mystery travellers then submit data from these into a bespoke internet-based system. The system incorporates a validation program written for this survey which ensures that complete and logically consistent data is submitted for each bus trip. For example, if the mystery traveller states that there is a Countdown electronic display fitted to the shelter or at the bus stop (Q1.3a), they must then answer Q1.3b to indicate whether or not it is working correctly.

In a number of instances the mystery traveller is required to enter a comment or verbatim explanation of a previous response. For example, at Q 0-7 if boarded bus not at the specified bus

stop but somewhere else, details of where the bus was boarded and the reasons for boarding elsewhere must be entered. The data entry system will not allow the mystery traveller to proceed without entering a comment at this point.

#### Verification of fieldwork by checking bus tickets and bus registration numbers

Mystery travellers submit their results online as described above. Pay claims are submitted by post and must include individual bus tickets and day passes purchased for the bus trips undertaken.

The bus licence number and vehicle registration number for each bus stage are recorded in Section 8 of the questionnaire. Bus registration numbers are entered into a website (<http://www.buslistsontheweb.co.uk>) to verify the area and bus operator specified for that stage. In some instances, if the full registration number has not been recorded by the mystery traveller, using 'wildcards' will match a registration to the area and operator.

The website does not contain all bus registration numbers for the areas and operators covered by the survey so it is not always possible to obtain a 100% match and verification of all bus trips in each journey.

Also there are some instances where the mystery traveller has not been able to record the complete vehicle registration number. In general we expect that at least 7 complete registration numbers will be recorded for each journey that can be verified by the website and, if this is not achieved, a further investigation is instigated.

#### Detailed description of data checks conducted on each record

As described above the online data entry system incorporates a validation system that ensures that data submitted is complete and logical.

When data is captured on the system a further set of data checks are conducted by our in-house proofing team. The proofer conducts a series of checks in accordance with written instructions provided by the project account team. Any responses that are outside specified parameters are logged for further checks by the account team. 'Outside specified parameters' is not synonymous with erroneous but simply are responses or sets of responses that are worthy of inspection / approval by the account team.

The most common area for logging and further checks by the account team relate to bus trips that do not conform with the journey plan or where the bus has departed later or earlier than scheduled.

For example, if Q 0-4a – Did you complete this stage within the assessment? – is answered No, the proofer checks any comments in Section 9 – Feedback on the Journey Plan – and leaves this record in ‘Ready to Proof’ status in the system (i.e. the assessment has not been approved but has been left in a status that requires further checks to be conducted by the account team).

A further check is that the time of arrival at the bus stop (Q0-6) should, obviously, be earlier than the scheduled bus departure time. However, if earlier bus trips in the journey have not gone according to plan and delays have been experienced, it is quite possible that the mystery traveller arrives at a bus stop after the scheduled departure time. This may merely require that a later bus on this service be taken. However, if it is not possible to adhere to the original scheduled bus/time for this stage due to prior delays, the actual versus scheduled bus departure times reported will be carefully checked to ensure that they are valid.

The full proofing instructions are included as Appendix 5.

## 9. Field quality management

### Allocation and monitoring of fieldwork progress and completion

Fieldwork is allocated to mystery travellers and their progress monitored by our Transport Operations team. Day to day communication with mystery travellers is the responsibility of a dedicated Project Controller who reports to a Team Leader. The Team Leader reports to the Field Quality Manager. The Project Controller can address any issues arising directly with the Team Leader or Field Quality Manager. The account team also provide advice and support to the Operations team as required.

The table below shows an example of progress during Quarter 1 fieldwork. This status report is provided to Passenger Focus on a weekly basis.

696158 PFO 12368	TOTAL JOURNEYS	JOURNEYS ALLOCATED	JOURNEYS TO ALLOCATE	JOURNEYS COMPLETED	COMPLETED BUS TRIPS	% COMPLETE
Greater Manchester	21	18	3	9	90/210	43%
Merseyside	14	12	2	6	60/140	43%
South Yorks	14	10	4	5	50/140	36%
Tyne & Wear	14	12	2	6	60/140	43%
West Midlands	24	18	6	9	90/240	37%
West Yorks	15	13	2	8	80/150	53%
Bristol	7	6	1	3	30/70	43%
Notts	7	5	2	2	20/70	29%
Leics	5	3	2	2	20/50	40%
total	121	97	24	50	500/1210	41%

#### Field accompaniments by Field Quality Auditors

Mystery travellers working on this survey are accompanied during fieldwork by Field Quality Auditors according to an agreed schedule for the purpose of appraising performance and monitoring fieldwork quality.

The field accompaniment is arranged in advance between the mystery traveller and Field Quality Auditor. The objective is to ensure that mystery travellers fully understand all aspects of the survey and to provide one-to-one /face to face support in the field.

The mystery traveller and Field Quality Auditor meet prior to the commencement of the survey journey/route to discuss the whole of the survey assessment process, questionnaire and supporting documentation and to check understanding, answer any questions and address any concerns. The Field Quality Auditor then accompanies the mystery traveller on the journey, checking that they are scoring accurately and providing guidance wherever it is needed.

An appraisal form is completed and returned to the Field Quality Manager and the results are entered on a central field quality database as part of the work record of each mystery traveller.

#### Field accompaniments by Passenger Focus

Passenger Focus personnel also accompany a proportion of fieldwork shifts in each wave with two main objectives:

- To evaluate the quality of the survey fieldwork and the attitude and competence of assessors from a client perspective. The emphasis is on monitoring that the work is being conducted in a consistent manner and in accordance with instructions.
- For personnel new to the survey, accompanying a fieldwork shift provides an opportunity to familiarise with the practical aspects of survey fieldwork.

GfK Field Quality Auditors and Passenger Focus personnel accompanying assessors need to carry this out in an appropriate manner that recognises the covert nature of the survey. Hence a degree of discretion is necessary in deciding where and when during the shift to ask questions or discuss the method of assessment so as not to alert bus drivers or other bus company staff that a mystery traveller survey is taking place.

## 10. Reporting

### Format and frequency

GfK provides Passenger Focus with the results for each wave of fieldwork in SPSS format.

On a half yearly basis an interpretative report is produced incorporating tables and charts. This is published on the Passenger Focus website. The reporting template and scoring matrix was inherited from when the Department of Transport was responsible for the survey.

This report is structured as follows:

1. Introduction
2. Methodology
3. Key results
4. Results tables and charts
5. Technical annex

Appendices

1. Questionnaire

JN. 696225 Bus Mystery Traveller Survey – Quarter 2 10-11

	Day	Month		Year			
0-1 Date of journey	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	0

0-2 VIN (7 digits)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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0-3 Journey Reference No. (4 digits)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
---	----------------------	----------------------	----------------------	----------------------

0-4 Stage within Journey (between 01-10)	<input type="text"/>	<input type="text"/>
---	----------------------	----------------------

0-4a Did you complete this stage within the assessment? (NO will route to 9-0)	Y	N
---	---	---

0-5 Bus Route No.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
-------------------	----------------------	----------------------	----------------------	----------------------

0-6 When did you arrive at this bus stop? (24 hour clock)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
--	----------------------	----------------------	----------------------	----------------------

0-7 Did you get on the bus at the stop specified on your Journey Plan?

Yes 1	No 2
-------	------

*If No - you boarded somewhere else - please provide details of where you boarded the bus and the reason(s) for boarding elsewhere:*

0-8 Scheduled time of bus departure as shown on the Journey Plan (24 hr clock)

0-9 Actual time of bus departure (24 hr clock)

**DO NOT** catch a bus more than 5 minutes earlier than the scheduled one on the Journey Plan unless the service is infrequent, i.e. the service interval is 30 minutes or longer.

*Record the time when the bus actually departs – not when you get on the bus*

(i.e. sometimes there may be a wait before departure).

**0-9a Did you catch an earlier or later bus than the scheduled one on the Journey Plan?**

Yes Later 1	Yes Earlier 2	No 3
----------------	------------------	---------

**0-9b If you did catch an earlier or later bus please explain why this occurred:**

Please note especially if the bus never turned up or if it drove straight past without stopping. If necessary, please ask the driver why the bus was early or late.

**0-10 Bus Type**

(a) Single Decker / Hoppa / Midi	1
(b) Articulated Bus	2
(c) Double Decker	3

### 0-11 Number of sets of passenger doors

(a) One Set	1
(b) Two Sets	2
(c) Three Sets	3

### 0-12 Day of week

Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5

### 0-13 Weather Conditions

Dry	1
Some rain	2
Heavy rain	3
Other – specify:	

### 0-14 Method of fare payment

Cash	1
Day Pass / other	2

## Section 1 Bus Stop

1.1a Is there a bus shelter?

Yes 1	No 2
-------	------

***NB You must always answer questions 1.1b, 1.1.c and 1.1d even if there is no bus shelter – if that is the case assess the bus stop only.***

### 1.1b Cleanliness of bus stop/shelter

The bus stop is the post which displays the route number(s) stopping at that location. It usually includes the stop name, direction of travel and fare stage / pass zone information. Cleanliness should be considered in isolation. Where applicable assess all seating and visible



parts of the shelter, including the roof, where visible. Ignore graffiti and litter when assessing the cleanliness, as the stop or shelter can still be clean.

Very dirty	0
	1
Quite dirty	2
	3
	4
Clean with minor areas of dirt	5
	6
.	7
Quite clean	8
	9
Spotlessly clean	10

#### 1.1c Level of graffiti, etching and / or vandalism at bus stop/shelter

Include graffiti itself, etchings and any unauthorised stickers and posters. Vandalism should relate specifically to damage that would appear to have been deliberate, not deterioration due to wear and tear, or lack of maintenance (*latter will be covered in 1.1f*). If the shelter has been vandalised this should automatically mean that a score of 5 or less is appropriate.

Significantly vandalised or is virtually covered in graffiti / etching	0
	1
Noticeably vandalised or the majority of surfaces have been covered in graffiti / etching	2
	3
	4
Very minor vandalism or has some prominent graffiti / etching	5
	6
.	7
Small / minimal graffiti or etching and nothing vandalised	8
	9
No graffiti, etching or vandalism	10

#### 1.1d Level of litter at bus stop/shelter

Assess the level of litter in and around the bus shelter and/or stop. Do not include the gutters or road in your assessment. Litter covers everything that people drop. Small items of litter (e.g. bus tickets or cigarette ends) while unsightly, are probably less intrusive than large items such as a whole newspaper or a burger carton.

Lots of litter, cartons, newspapers, etc	0
	1
Some large items of litter or large amounts of small litter	2
	3
	4
Litter beginning to build up	5
	6
.	7
Very little litter; perhaps small pieces of litter	8
	9
No litter whatsoever	10

### 1.1e Condition of shelter glass

*Code N/A only if there is no shelter to assess*      *N/A*

Where shelter glass or perspex panels are present, is any of the glass missing, shattered or seriously damaged?

Yes 1

No 2

### 1.1f Condition of shelter

*Code N/A only if there is no shelter to assess*      *N/A*

This is concerned with the general condition / maintenance of the structure of the shelter (include seating if present) and taking account of how graffiti, etching etc has been made good. Litter should be also ignored. If shelter glass is broken this should be included in the assessment. Broken glass in information displays and advertising hoardings should also be included. The condition of maps, timetables and advertisements within casements should not be included. If the shelter has any damage this should automatically mean that a sub 5 score is appropriate.

Totally dilapidated/in dangerous condition	0
	1
Very poorly maintained / shelter has damage	2
	3
	4
Neither good nor poor condition	5
	6

.	7
Well maintained	8
	9
In perfect condition	10

### 1.1g Adequacy of lighting at or around bus stop/shelter

**Code N/A only if assessing in daylight, except if lights are broken or obviously damaged. Please score this question irrespective of whether or not a light is fitted to the shelter**

N/A

This is a measure of the artificial lighting at and around the bus stop/shelter. If a bus stop is near a street light or a well-lit shop window, there may be less need for bus stop lighting. This should be taken into account when making the assessment. An advertising display in the shelter end panel may also form part of the lighting. A score of '0' should be recorded if the bus stop/shelter is so poorly lit that you feel wary or unsafe.

Very poorly lit so that you feel wary or unsafe <u>or</u> one or more lights broken or missing	0
	1
Poorly lit – lack of lighting in and around bus shelter <u>or</u> lights working but damaged	2
	3
	4
Sufficiently lit but not bright	5
	6
.	7
Well lit	8
	9
Bright and very well lit	10

1.2a Was there a timetable at the bus stop for the bus route you were waiting to board?

Yes 1	No 2
-------	------

1.2b Was the timetable up to date and legible?  
(i.e. was it useable?)

Yes 1	No 2
-------	------

***Identifying if the timetable is up to date? Please look for a date on the timetable and compare the timetable with the information provided in the journey plan.***

### Countdown Electronic Display

**NB 1.3a must always be answered**

**1.3a Was there a Countdown electronic display fitted to the shelter or at the bus stop?**

Yes 1	No 2
-------	------

This is concerned with the electronic information panel (Countdown) that is located in some shelters and displays information about bus arrivals at the stop. It is situated either in the roof of the shelter or occasionally, as a freestanding unit.

**1.3b Was the Countdown display working properly?**

Yes, working correctly 1	Yes, but with errors 2	No, nothing displayed 3	N/A 4
--------------------------	------------------------	-------------------------	-------

**1.3g Was the Countdown display easy to read?**

Yes 1	No 2
-------	------

### Other information provided at the Bus Stop

**1.4a Was there information about fares?**  
*(for the service on this specific stage of the journey)*

Yes 1	No 2
-------	------

**1.4b Was there contact information for the bus company?**  
*(for the company specified for this stage of the journey)*

Yes 1	No 2
-------	------

**1.3f Was there contact information for Traveline?**

Yes 1	No 2
-------	------

## Section 2 Bus Exterior - Front

*These next two questions are concerned only with the bus you are about to board. Do not rate or include in your assessment any other buses you may see while waiting for your bus.*

**2.1a Route number / destination information type – FRONT**

*Code N/A only if the bus does not have the facility for a FRONT display*      N/A

Please identify whether the route number and/or destination information was displayed via an electronic display or a mechanical blind.

**Electronic display**

**Mechanical Blind**

### 2.1. Clarity of route number / destination blind - FRONT

The route number and destination blinds must be absolutely accurately displayed and aligned. If there is the slightest discrepancy '10' should not be given. Be highly critical on this item and do not give the benefit of the doubt. Always rate the worst item, be that the route number or the destination blind. Electronic displays that are working correctly should generally score '10'.

Route number or destination blind unacceptable / not displayed at all	0
	1
Route number or destination blind extremely confusing / misleading	2
	3
	4
Route number or destination blind readable but confusing / not properly set	5
	6
.	7
Route number and destination blind readable but not fully in place	8
	9
Route number and destination blind totally visible and correctly displayed	10

**Section 3 relates to Boarding the Bus. In order to assess Section 5 - Bus Interior as accurately as possible, *please sit as far back as possible in the bus.***

### Section 3 Boarding the Bus

#### 3.1 Was the bus stop obstructed in any way?

If parked vehicles or anything else that makes it difficult for the driver of your bus to pull into the stop correctly obstruct the bus stop, this should be recorded here. NB. Other buses using the stop or nearby stops do not count as obstructions.

Yes 1

No 2

#### 3.2 Closeness of bus to kerb

Bearing in mind your answer at 3.1, your bus should pull close to the kerb so that passengers do not need to step into the road. Do not be over-generous in this judgement as accessibility to buses is an important issue for elderly and disabled people, passengers with young children and those encumbered by shopping or luggage. Include all doors in your assessment.

<b>Very poor, large gap between kerb and bus</b>	<b>0</b>
	<b>1</b>
<b>Poor, could have pulled in closer</b>	<b>2</b>
	<b>3</b>
	<b>4</b>
<b>Accessible with minor difficulty</b>	<b>5</b>
	<b>6</b>
.	<b>7</b>
<b>Quite good</b>	<b>8</b>
	<b>9</b>
<b>As close as reasonably possible</b>	<b>10</b>

### 3.3 Closeness of bus door to stop

Bearing in mind your answer at 3.1, your bus should pull in at the bus stop so that passengers do not need to walk along the road to board (for articulated buses rate the front door). Do not be over-generous in this judgement as accessibility to buses is an important issue for elderly and disabled people, passengers with young children and those encumbered by shopping or luggage.

<b>Had to walk to catch bus</b>	<b>0</b>
	<b>1</b>
<b>Poor</b>	<b>2</b>
	<b>3</b>
	<b>4</b>
<b>Reasonable but not exactly at stop</b>	<b>5</b>
	<b>6</b>
.	<b>7</b>
<b>Quite good</b>	<b>8</b>
	<b>9</b>
<b>At stop or as reasonably close as possible</b>	<b>10</b>

**3.4 Was there any congestion due to other buses when you were boarding?**

<b>Yes 1</b>	<b>No 2</b>
--------------	-------------

## Section 4 The Driver

### 4.1 Did the driver give you the correct ticket?

You should check that the fare stated by the driver, when you state your destination, is the same as that printed on the ticket issued. You should also check the date. If either the fare or the date is incorrect, answer No.

Yes 1	No 2	N/A / Day pass 3
-------	------	------------------

### 4.2 If not paying cash, did the driver record your boarding of the bus? (e.g. by pressing a button on the Electronic Ticket Machine (ETM))

Yes 1	No 2	N/A / Paid cash 3
-------	------	-------------------

### 4.3a Please ask the driver one of the questions listed below and then answer 4.3b

NB. You are not assessing whether or not the answer is accurate.

Please indicate the question asked on this bus trip	
What time is the last bus back from.....?	1
Does this bus go close to ....e.g. station?	2
Can you tell me where I can get a bus timetable for this route?	3
How long will it take to get to....?	4
Does this service run on a Sunday?	5
How much is a day pass? (if paying cash)	6
Other	7

### 4.3b Helpfulness of driver and consideration for passengers

Base on the manner in which the driver responded to your question. Where possible you should also take the driver general helpfulness to other passengers into consideration when making your assessment. To achieve a score above '6' you should actually observe the driver being helpful. Higher scores should only be recorded if the driver puts himself out to be helpful. It is part of the job for drivers to be helpful, even when it is busy. Do not give the 'benefit of the doubt' in making your assessment. Ignoring passengers trying to catch the bus, passengers' requests for information, assistance etc. or hindering passengers in any way is unacceptable.

Deliberately unhelpful in any way	0
	1

Reluctant to give information, abrupt, not very helpful to passengers	2
	3
	4
Gave information when asked but no positive action to help passengers	5
	6
.	7
Gave information willingly and gave help even when not specifically asked to	8
	9
Excellent – did something special to help passengers	10

4.3c Did the bus driver speak clearly/was easy to understand?

Yes 1

No 2

#### 4.4 Appearance of Driver

Regardless of whether the driver is wearing a uniform or not, staff must be smart and take pride in their appearance. Inevitably, what is worn will vary with the time of year.

Very untidy, scruffy, dirty or inappropriately dressed	0
	1
Poor, untidy	2
	3
	4
Reasonable but could be smarter	5
	6
.	7
Good, smart	8
	9
Excellent, smart and takes pride in appearance	10



## Section 5 Bus Interior

***You are only required to assess conditions and facilities on the chosen deck.***

***This applies to all questions in Section 5. You may sometimes observe features on the lower deck as you ascend or descend from the upper deck but you are not required to assess the lower deck features in these circumstances.***

### 5.1 Which deck did you assess?

Single Decker / Articulated	1
Lower deck of Double Decker	2
Upper deck of Double Decker	3

### 5.2 Availability of lower deck seating

*If you are assessing the upper deck of a Double Decker, you should skip this question*

**Make a general assessment of crowding based on the number of seats available or people standing. The bus should not be uncomfortably over-crowded. You must base your answer on the availability of seating at the time you set off from your boarding stop.**

Very over crowded	0
	1
No available seats, many people standing	2
	3
	4
No available seats but nobody standing	5
	6
.	7
Many single seats available	8
	9
Many double seats available	10

### 5.3 Availability of upper deck seating

*If you are assessing the lower deck, you should skip this question*

**There should never be anybody travelling on the stairs or standing on the upper deck, regardless of the availability of seats. Even if only one person is standing, a zero rating should be given. Include anyone standing on or at the head of the stairs in this assessment. You must base your answer on the availability of seating at the time you set off from your boarding stop.**

One or more passengers standing	0
	1
No available seats	2
	3
	4
Majority of seats occupied	5
	6
.	7
Many single seats available	8
	9
Many double seats available	10

#### 5.4a Cleanliness of seating

Code N/A only if you are unable to assess cleanliness of seating **N/A**

Whether or not there is enough seating and regardless of comfort, all seats should be clean. You should expect to be able to sit on a seat with your best clothes on. Include graffiti in your assessment. Rate the seat including the seat back but not the rear of the seat facing the passenger in the row behind. Always rate the worst seat you can see. Do not include vandalism.

Not fit to sit on	0
	1
Dirty / mucky in places but possible to sit on	2
	3
	4
Generally clean with minor areas of dirt or staining	5
	6
.	7
Quite clean, no very obvious dirt or stains	8
	9
Spotlessly clean, as new	10

#### 5.4b Condition of seating

Code N/A only if you are unable to assess condition of seating **N/A**

Whether or not there is enough seating, it should be in good condition. Include vandalism but not comfort, graffiti or cleanliness. Always rate the worst seat. NB. The rear seats on the upper deck of double deckers can have vandal proof plastic seats; this is acceptable and seating should not be marked down because of it.

Not fit to sit on / dangerous	0
	1
Poor, some damage to seats	2
	3

	4
Minor damage to seat, worn but usable	5
	6
.	7
Good condition, slight fading or repair evident	8
	9
In excellent condition	10

### 5.5 Cleanliness of windows

Code N/A only if you are assessing at night, when it is dark, when it is raining or when the windows are affected by condensation **N/A**

The windows should be clean, inside and out, and completely clear. The window frame's cleanliness should be included in your assessment. Do not include etching in your assessment.

Very dirty, scratched or marked, difficult to see through	0
	1
Some dirt or dust or more than 25% affected by marks or graffiti	2
	3
	4
Small areas of dirt, dust beginning to build up. Less than 25% affected by marks or graffiti	5
	6
	7
No noticeable dirt, dull not shiny	8
	9
Spotlessly clean, including frame	10

### 5.7 Level of Graffiti

Both graffiti itself and any visible marks where it has been removed should be assessed, including smearing and ghosting. Do not include surfaces worn due to repeated removal of graffiti. Include unauthorised stickers, posters but do not count etchings on windows as graffiti.

Bus covered in graffiti	0
	1
Majority of bus surfaces have graffiti	2
	3
	4
Small amounts of graffiti on less than half the surfaces	5

	6
	7
Very little graffiti, only noticeable if you look for it	8
	9
No graffiti whatsoever	10

### 5.8 Presence of etching on windows

*Code N/A only if you are assessing at night, when it is dark, when it is raining or when the windows are affected by condensation. N/A*

All windows with etching	0
	1
Majority of windows with etching	2
	3
	4
4-5 windows with etching	5
	6
	7
Up to 3 windows with etching	8
	9
No etching whatsoever	10

### 5.6 Level of Litter

Litter covers everything that people drop. It may be on or under seats, in the luggage space, ledges or floor.

Lots of litter, cartons, newspapers, etc	0
	1
Part of bus heavily littered, newspapers, old cans, etc	2
	3
	4
Litter beginning to build up	5
	6
	7
Very little litter, perhaps small pieces of litter	8
	9
No litter whatsoever	10

Were there any types of litter bins?

5.6a Small bins designed to take tickets	Yes 1	No 2
5.6b Bins for passenger litter	Yes 1	No 2

### 5.9 Presence and Condition of Customer Information and PA Announcements

Record which of the following are present within the bus and assess their condition. For the information to be usable by the public it should be up to date and legible. Code whether it is present, up to date and legible or not.

	Present and legible	Present but damaged/illegible	Not Present
Fixed signage with generic requests (e.g. "Do not talk to the driver whilst driving" etc.)			
Route Maps			
Electronic Stop Display			

	Present and audible	Present but inaudible	Not Present
Recorded P.A. Announcements			

## Section 6 Quality of Ride

*For these questions you are not expected to make a technical assessment. You are to consider the quality of the ride as an 'ordinary' passenger. Bear in mind, however, that these are very important factors for passengers and are also safety related.*

### 6.1 Appropriateness of Speed

The appropriate speed of the bus is dependent on the road and traffic conditions. Under no circumstances should the driver break the statutory speed limit but what is an appropriate speed on a dual carriageway may not be appropriate in a side street, a congested main road or down a country lane. Your assessment should be made on the basis of your feelings as an 'ordinary' passenger. Acceleration away from the bus stop should not be included in your assessment. This question is concerned with the progress of the bus along the road.

Always rate the worst part of your journey.

Felt in danger due to excessive speed	0
	1
Poor, felt nervous, excessive speed for road conditions	2
	3
	4
Generally appropriate, occasional speeding	5
	6
	7
Appropriate for road conditions	8
	9
Excellent, felt totally safe	10

## 6.2 General smoothness of ride

Consider any up and down or side-to-side motion and any 'lurching' caused by the driver braking, accelerating or decelerating. Also take into account the way in which the driver drives over any speed bumps during the journey. Try to assess the quality of the ride in the same way on every bus (e.g. setting yourself a task such as signing your name). In this way you will be able to judge how smooth the ride is.

Extremely rough, passengers constantly thrown about, bus mounting kerb/s, braking sharply unnecessarily	0
	1
A lot of movement and jerking – hard to keep balance when seated	2
	3
	4
Some rocking, effort required to read paper	5
	6
.	7
Reasonably smooth	8
	9
Very smooth, could stand up and read	10

## Section 7 Bus Exterior

### 7.1a Route number / destination information type – BACK AND SIDE

*Code N/A only if bus does not have the facility for either a Back or Side display and go to 7.2*                      *N/A*

Please identify whether the route number and/or destination information was displayed via an electronic display or a mechanical blind.

## Electronic display

## Mechanical Blind

### 7.1 Clarity of Route number / destination blinds – BACK AND SIDE

*Code N/A only if bus does not have facility for either Back or Side display and go to 7.2*                      *N/A*

The route number and destination blinds must be absolutely accurately displayed and aligned. If there is the slightest discrepancy '10' should not be given. Be highly critical on this question and do not give the benefit of the doubt. Always rate the worst example whether it is the route number or the destination blind, back or side. Electronic displays that are working correctly should generally score '10'.

Route number or destination blind unacceptable / not displayed at all	0
	1
Route number or destination blind extremely confusing / misleading	2
	3
	4
Route number or destination blind readable but confusing / not properly set	5
	6
	7
Route number or destination blind readable, but not fully in place	8
	9
Route number or destination blind totally visible and correctly displayed	10

### 7.2 Overall cleanliness of exterior – front, side and back

*Code N/A only if assessing when it is dark in winter*                      *N/A*

Cleanliness should be assessed in isolation. An old or damaged bus can still be clean. Do not include graffiti. Be highly critical on this question and do not give the benefit of the doubt. Always rate the worst example. Do not take the weather into account.

Unwashed, you would avoid touching	0
	1
Excessively dirty, not properly washed	2
	3
	4
Moderately clean, some areas of dirt building up	5
	6
	7
Quite clean with very little dirt	8
	9
Spotless, could run your hand over it	10

### 7.3 Overall level of graffiti on bus exterior

*Code N/A only if assessing when it is dark in winter*      *N/A*

Both graffiti itself and any visible marks where it has been removed should be assessed. Include unauthorised stickers or posters as graffiti. Be highly critical on this question and do not give the benefit of the doubt. Always rate the worst example.

Majority of bus covered in graffiti	0
	1
Large areas of graffiti	2
	3
	4
Small areas of graffiti	5
	6
	7
No graffiti but marks where previously been	8
	9
No evidence of graffiti	10

## Section 8 Alighting from the bus

### 8.1 Was the bus stop obstructed in any way?

If parked vehicles or anything else that makes it difficult for the driver of your bus to pull into the stop correctly obstructs the bus stop, this should be recorded here. NB. Other buses using the stop or nearby stops do not count as obstructions.

Yes 1

No 2

### 8.2 Closeness of bus to kerb

Bearing in mind your answer at 8.1, your bus should pull close to the kerb so that passengers do not need to step into the road. Do not be over-generous in this judgement as accessibility to buses is an important issue for elderly and disabled people, passengers with young children and those encumbered by shopping or luggage. Include all doors in your assessment.

Very poor, large gap between kerb and bus	0
	1
Poor, could have pulled in closer	2
	3
	4



Accessible with minor difficulty	5
	6
.	7
Quite good	8
	9
As close as reasonably possible	10

*Please try to record both of the following numbers. If this is difficult, please try to get the vehicle registration first.*

**8.3a Bus Licence Number**

Please record the licence number of this bus

--	--	--	--	--

**8.3b Bus Vehicle Registration No.**

Please record registration

--	--	--	--	--	--	--

**8.4 Scheduled time of bus departure from stop at which you alighted (24 hour clock)**

--	--	--	--

**(NB. this is the alighting time shown on your journey plan for this Stage)**

**8.4a**

What time did the bus you have just alighted from leave the bus stop? (24 hour clock)

--	--	--	--

If the point of alighting is the last stop, record the time as you get off. If the bus waits so long at the stop that you risk not keeping up with the journey plan, then leave 8.4a blank and answer code 4 I left before bus departed at 8.4b below.

**8.4b Did the bus depart at the scheduled time you have recorded at 8.4 or later or earlier than this scheduled time?**

Departed at scheduled time 1	Later (at least 6 minutes after scheduled time) 2	Earlier (at least 2 minutes before scheduled time) 3	I left before bus departed 4
------------------------------	---	--	------------------------------

*“Later than scheduled” = at least 6 or more minutes after the scheduled time*

*“Earlier than scheduled” = at least 2 or more minutes before the scheduled time*

To make this more clear: if alighting time for this stage in your journey plan (which you have entered at 8.4) states 12:30, the bus is early if it leaves at 12:28 or earlier; or late if it leave at 12:36 or later.

8.4c If later or earlier than scheduled, why was this? ( if the reason is not clear, code Don't know)

Bus departed early	1
Bus departed late	2
Traffic congestion	3
A very busy bus route	4
Road works	5
Road closures / diversions	6
Weather conditions	7
An event the bus company could not foresee (e.g. traffic accident)	8
Other	9
Don't know	10

8.4cc If 8.4c 'other', please record the reason as fully as possible

--

### 8.5 Anti-social behaviour by other passengers observed during your journey

Please code if you experienced any of the following types of anti-social behaviour during your journey.

	Yes at the stop	Yes on the Bus	No
Threatening / intimidating behaviour (e.g. fighting, verbal threats, having concerns for one's personal safety)			
Concerning behaviour (e.g. individuals / groups acting boisterously, swearing, alcohol being consumed, smoking, etc)			
Unsocioable behaviour (e.g. feet on seats, not making a seat available, littering the bus etc)			
Inconsiderate behaviour (e.g. eating inappropriate foods, loud music, etc)			

8.6 If there was any 'threatening / intimidating' or 'concerning' behaviour on the bus did the driver take any action?

	Yes	No	Not applicable
Threatening/intimidating behaviour			
'Concerning' behaviour			

**8.7 If Yes, what action did the driver take?**

**8.8 Did you observe the driver doing any of the following whilst you were on the bus?**

This question does not include the authorised use of the two-way radio fitted to buses for operational and security reasons. Please comment where necessary about the driver’s behaviour at question 8.10

	Yes	No
I Pod		
Mobile phone		
Eating		
Smoking		
Having a conversation with a friend / passenger		

**8.9 Your overall satisfaction with this bus trip**

Finally, as a member of the public, how satisfied were you with the overall service?

*Please give a score out of 10 where 10 means you were “Completely Satisfied” with the overall service and 0 means you were “Completely Dissatisfied”. A score between 0 and 10 indicates how satisfied or dissatisfied you feel with the service.*

Score out of 10

**8.10 Any further comment(s) about this stage of the journey?**

If you have any comments you would like to make about this stage of the journey please do so here (except if the comments relate to the journey plan, in which case they should be left in the appropriate parts of Section 9 below.

**Section 9 Your feedback on the Journey Plan?**

If there were any problems in completing this Stage on the Journey Plan, please explain the reasons below. Even if there are no major problems but you think that the information on the journey plan for this stage could be made clearer, then please let us know by completing this section. If the problem(s) encountered are

likely to be temporary (e.g. road works) please specifically note the temporary nature of the problem.

In order for us to act on your feedback, it is essential that you enter any comments against the specific information box on this stage of the journey plan. If your comments are more general, there is a question at the end for these.

Bus Company for this stage:
Bus No. for this stage:

**Information relating to Boarding**

Area:
Road:
Stop Description:
Time (24 hour clock):
Next bus due (mins):

**Information relating to Alighting**

Area:
Road:
Stop Description:
Time (24 hour clock):
Time between alighting and departure of next stage (mins):

If there is any other information you feel would be helpful in carrying out this stage of the journey plan in future, please describe below.

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## 2. Assessor Briefing Notes

### Bus Mystery Traveller Survey Quarter 2 10-11

## Assessor Briefing Notes

### 1. Background

GfK has been commissioned by Passenger Focus to conduct a Bus Mystery Traveller Survey in nine areas of England outside London. The objective is to assess the level of service provided to bus travellers in each of the nine areas.

### 2. Overview

You are required to undertake a number of specific bus trips which have been arranged into a “journey plan”. You are provided with exact instructions of which bus stops and which bus routes to use for each journey plan and you must stick to this plan. You must read and understand these notes thoroughly before starting work on the programme.

### 3. Timings

For this survey, no assessments can be carried out during the school holidays. In this current wave all assessments should be completed by 9<sup>th</sup> July 2010.

It is extremely important that you contact us immediately if you know you will be unable to carry out a route that has been allocated to you. If this happens please call Megan Kinsella at GfK on 01865 262850 or e-mail her at [PFO@gfk.com](mailto:PFO@gfk.com) as soon as possible so that we can re-allocate the route to someone else.

### 4. Journey Plan

Study your Journey Plan carefully at home before leaving to carry out the assessments. This contains the key information you need to navigate your way around the different bus stops and bus trips making up your shift. Each Journey Plan is designed to take approximately 5.5 hours to complete and will either be a morning shift – 7:30am–1:00pm – or an afternoon shift – 1:00pm-6:30pm. Time spent familiarising yourself with the route you have to follow will prove to be time well spent and help you find your way around more easily and allow you to focus all your attention on the actual assessments and accurate completion of the questionnaires.

- **Stage:** Typically your Journey Plan will comprise around 10 separate bus trips (trips).
- **VIN:** Each Stage in the Journey is assigned a separate VIN number and you will need to enter the results for this Stage against this VIN on Cybershop.

For each stage you must assess the correct bus as specified in the Journey Plan:

- **Bus Company**

- **Bus Number**
- **Direction** *Indicates the broad direction of the bus (i.e. W = West, N = North etc.)*
- **Destination** *Final destination of this bus*

The following information is shown for the stop where you board the bus and the stop where you alight at the end of this stage:

- **Area** - district where bus is located
- **Road** - where the bus stop is located
- **Bus stop description** - additional description of the location of the stop
- **Time** - scheduled times to board and alight from this bus
- **Next bus due (mins)** - time interval before the next bus is scheduled to arrive (in case you miss the bus scheduled)
- **Grid References** - 12 digit grid references for the bus stop location
- **Additional Information**- any further advice or guidance on navigating this route
- **Time between alighting and departure of next stage** - tells you how long you have to get to the next stop.

## 5. Preparing your route before you set off

It is a good idea to have a look at your route before you set out. On your journey planner we have given you the co-ordinates of each bus stop on your route. You can have a look at the map of each location by putting these co-ordinates in to [www.streetmap.co.uk](http://www.streetmap.co.uk). This particularly helps if you are unfamiliar with the area in which you will be travelling. If this is the case please try and do this as it will help you to know how long it will take to get to your start point and you will also be able to see how far apart your start points and end points are. You can also check timetables on [www.traveline.org.uk](http://www.traveline.org.uk)

## 6. Measuring bus punctuality

This is a key objective of the survey. Please study carefully the revised questionnaire and expanded notes relating to recording bus departure times, both at the start of each bus stage (Section 0 – page 4) and after you alight from the bus (Section 8 – pages 7-8).

The definition of whether a bus service is running early or late, as opposed to on-time, is made based on whether it departs from a bus stop just a small number of minutes from its scheduled time. Therefore the recordings of 'actual departure time' both at boarding, and now alighting, do need to be made as precisely as possible. Firstly, please ensure that you use an accurate watch/timing device which has been set to the correct time from the radio or TV teletext before you start your day's journey, and, secondly assess departure times very carefully, i.e. as stated – when the bus departs the stop. Please record only the hour and minute, do not round up, i.e. 10:42 and 45 seconds should be recorded as 10:42.

## 7. Paying your Bus Fare

For some journeys you should pay your bus fare by cash and for others you will need to obtain a day pass. The method of fare payment is specified for each stage on your journey plan.

For most journeys you will find that the method is the same for all trips in the journey – either cash or a day pass for all 10 bus trips. However, there are a few exceptions to this where there is a mix of cash and day pass trips within the same journey.

Our primary interest – when not paying cash – is whether or not the driver records your boarding of the bus – see Q4.2 on page 8 of the questionnaire.

If your journey involves using a day pass, buy the most economic option for the entire journey - including your travel to and from home if possible.

## 8. Lower or Upper Deck?

When travelling on a double deck bus you must assess the interior of only one deck. To ensure that across the whole survey we represent both upper and lower decks, please try to rotate which one you assess each time you travel on a double decker bus.

## 9. Route terminated before advertised destination

If the bus you are assessing is terminated before its advertised destination and this is not due to an accident or emergency, please inform us by writing the details in the additional information section at the end of the questionnaire.

There is usually another bus (same route number) following shortly afterwards, in which case you can easily continue your journey. In such instances you must assess the first bus that you travel on, not the second one.

## 10. Emergencies and Delays

In the unlikely event that the bus breaks down or there is another reason why the bus journey is not completed, you should try and complete as much of your journey as possible, e.g., perhaps you could miss out one of the buses and pick up the journey at a later stage by catching another bus.

If there is an emergency or delay which stops you completing one or more Trips in your Journey Plan, please explain the problem in the additional information section at the end of your questionnaire.

In the event of an accident or emergency you should behave as an ordinary passenger - your Mystery Traveller role does not carry any special responsibilities.

If your bus has not turned up please wait for the next scheduled bus as shown on your journey planner. This will generally be no more than 20 minutes away. If the next scheduled bus has failed to turn up at the correct time please wait 5-10 minutes in case it is just delayed. If it doesn't turn up at all please call Megan Kinsella at GfK. We will be able to help you restart your journey without having to abandon the whole route. Please do not call the GfK helpdesk as they will probably be unable to help you or put you through to the right person.

#### **11. If you are challenged... (and how you might avoid this!)**

We want to avoid bus operators knowing which routes we are assessing, therefore, try to avoid being detected by bus company staff. Personalise your "filofax" with stickers, cover, etc. (you can, if you wish, use your own filofax). Remember that bus drivers make extensive use of their rear view mirrors - be particularly discreet after you have alighted and are recording details about the back of the bus.

If a crew member or other bus company staff member enquires what you are doing, just tell them politely and tactfully that it is private. If they are insistent, show them your letter of authority.

If you are challenged as being a Mystery Traveller, just say that you do not know what they mean - do not confirm that you are a Mystery Traveller unless the situation becomes difficult. You are provided with a Letter of Authority from Passenger Focus which can be shown if this happens.

If either of the above situations occurs, please e-mail the helpline.

**NB.** Always respond politely to bus drivers, conductors, etc., even if you think they are being unreasonable.

#### **12. Completing the assessment and questionnaire correctly**

You should have a good understanding of the procedure and be familiar with the questionnaire and how to assess the different aspects included in this survey. However, take every opportunity to renew your awareness of the correct procedures by reference to these instructions together with the questionnaire.

The questionnaire is divided into 9 sections as follows:

- 0. Background Information (Date of journey, Times, Bus Type, etc.)**
  - 1. Bus Stop**
  - 2. Bus Exterior – Front**
  - 3. Boarding the Bus**
  - 4. The Driver**
  - 5. Bus Interior**



6. Quality of Ride
7. Bus Exterior
8. Alighting from the Bus
9. Your feedback on the Journey Plan

### Format of rating scales

If you worked on the previous quarter, you will be aware that the rating scales (scores out of 10) were changed from being displayed across the page to down the page, starting with Zero and ending with 10. Always take care to read the descriptors and select the most appropriate score.

### Section 0 (pages 1-2)

0-7 You should always get on the bus at the stop specified on your journey plan. If for any reason this is not possible and you have to board elsewhere, please provide details of where you boarded and the reason(s) why.

*Note this question relates specifically to the location of the bus stop – it is not related to the time of the bus so if your bus is early or late do not answer NO nor leave a comment at 0-7*

### Measuring the punctuality of the bus departure (0-8, 0-9, 0-9a and 0-9b)

#### 0-8 Scheduled time of bus departure

- In most cases you should enter the time specified in your journey plan for departure of this stage. Obviously you will have arrived at the bus stop sufficiently in advance of this departure time in order to assess the stop/shelter in Section 1. (so the time at 0-6 is earlier than the scheduled departure time at 0-8)
- If for any reason (e.g. delays on an earlier stage of the journey) you arrive at the bus stop (time at 0-6) after the scheduled departure time, you should normally catch the next scheduled bus. In this case enter at 0-8 the scheduled time of this bus, which is also provided on your journey plan.
- If you have been delayed to such an extent that you arrive at the bus stop (time at 0-6) after both the first and second departure times shown on your journey plan, then it will not be possible to record accurately the scheduled departure time at 0-8 because this is not provided in your journey plan. The next bus may be scheduled at the same frequency as the previous two buses listed (e.g. every 15 minutes); however, it would be dangerous to assume this is the case since we are trying to ensure that our measurement of bus punctuality is completely accurate. Therefore in this instance please enter 00 00 at 0-8 to indicate that you were unable to record the scheduled departure time.

### **0-9 Actual time of bus departure**

- In all cases simply enter the actual time the bus departs. As will be clear from the notes above on 0-8, we will only be able to accurately compare the actual departure time with the scheduled time, if you have kept to the journey plan schedule. Record the time the bus actually departs, not the time you get on the bus as sometimes there is a wait before it departs.

Note the instruction that you must NOT catch a bus more than 5 minutes earlier than the scheduled one on the journey plan, unless the service is infrequent, i.e. 30 minutes or longer between buses. If you do catch a bus outside of this time, check with the driver whether it is the service you should have caught that is running unusually early/late.

### **0-9a Scheduled, earlier or later bus**

- To clarify the times you have recorded at 0-8 and 0-9, indicate which of these applies. If you caught the scheduled bus on the journey – this can be either the first one or the second one shown on your journey plan – please answer No (Code 3).
- Note especially that this question refers to which bus you caught compared with the ones shown on the journey plan – it does not ask you whether or not the actual time of departure was early or later than scheduled – we will calculate this from the times you record at 0-8 and 0-9.

### **0-9b Reasons for catching an earlier or later bus than scheduled**

- Please explain why this occurred – was it because neither of the two scheduled buses shown on the journey plan turned up? Or drove past without stopping?
- Usually if you have not been able to adhere to the journey plan and catch either the first or second bus listed for this stage, you will know the reason for this. If not, ask the driver for an explanation.

**0-14 Method of fare payment – Please adhere to the fare payment method specified on your journey documentation – you must not use any type of concessionary fare for this survey.**

## **Section 1 – Bus Stop (pages 3-6)**

### **1.1a Is there a bus shelter?**

- Record if there is a bus shelter
- If the bus stop does not have a shelter but is under cover being situated in a bus station, answer No.

### **1.1b Cleanliness 1.1c Graffiti, etching and vandalism 1.1d Litter**

- Assess both the stop and shelter if there is one

- If there is no shelter then simply assess the bus stop only.
- Note that 1.1c was changed from Q1 in April – etching is now included as is vandalism. Read carefully the revised notes and the revised descriptors in the rating scale.

#### 1.1e Condition of Shelter Glass

- If there is a shelter, please report if there is any glass (or perspex) missing, shattered or seriously damaged.

#### 1.1f Condition of Shelter

- The notes and the rating scale descriptors for this question were changed from Q1 in April.

#### 1.1g Adequacy of lighting at or around bus stop/shelter

- Please read the detailed instructions provided on the questionnaire.

**1.2b Identifying if the timetable is up to date?** Please look for a date on the timetable and compare the timetable with the information provided in the journey plan.

#### Countdown Electronic Display:

Please record if there is one of these displays – see the notes after 1.3a – was it working properly? and was it easy to read? Note that you no longer need to describe any errors with the display nor why it was not easy to read.

#### Other information provided at the Bus Stop:

Record if there was:

**1.4a - Information about fares** (for the service you are using on this stage of the journey). If the only information is generic and not specific to the service for this stage, e.g. a notice stating “we operate an exact fare policy, please have the correct change ready”, then you should answer No.

**1.4b - Contact information for the bus company** (the one specified for this journey stage). This can be the name of the relevant company with a telephone number or a postal address or website. It may or may not refer to specific topics of customer concern such as anti-social behaviour or disabled access. For any of these for the specific bus company for this stage, answer Yes.

#### 1.3f - Contact information for Traveline

### Section 2 – Bus Exterior - Front (page 6)

**2.1a Record the type of route number/destination information on the front of the bus you are boarding – is it an electronic display or an old style mechanical blind?**

2.1 Please rate the clarity of the blind – read the instructions and descriptors carefully. Note that electronic displays that are working correctly should generally score 10.

### Section 3 – Boarding the Bus (page 7)

*NB in order to assess the bus interior as accurately as possible, please sit back as far as possible in the bus.*

#### 3.1 Was the bus obstructed in any way

- Note that for the purpose of this survey other buses using the stop or nearby stops should not be counted as obstructions. Hence you should only answer Yes if there are other types of obstructions.
- You no longer have to record the cause of obstruction.

#### 3.2 Closeness of bus to kerb and 3.3 Closeness of bus door to stop

- Please read the detailed instructions provided on the questionnaire.
- You should exercise some judgment according to the circumstances or layout of the particular stop and what is possible. However, as the stated in the notes on the questionnaire, you should not be over-generous (“making allowances”) as accessibility is an important requirement for elderly and disabled people, passengers with young children and those with shopping or luggage.
- We cannot provide exact distances – use the descriptors in the scale and judge according to the circumstances of the stop.

#### 3.4 Was there any congestion due to other buses when you were boarding?

- You are no longer required to describe any congestion – just answer Yes or No.

### Section 4 – The Driver (pages 8-9)

#### 4.1 Did the driver give you the correct ticket?

- If paying cash, record if you were given the correct ticket (see the instructions on the questionnaire).
- If using a day pass for this stage, mark N/A.

4.2 If not paying cash, note if the driver records you boarding the bus – by pressing a button on the Electronic Ticket Machine.

#### 4.3a Choice of questions to pose to the driver

- Ask the driver a question from the list supplied (or ask your own question) – in order to assess the helpfulness of the driver.

#### 4.3b Helpfulness and 4.4 Appearance

- Please read the detailed instructions provided on the questionnaire.

4.3c Did the bus driver speak clearly? Was he/she easy to understand?

### Section 5 – Bus Interior (pages 9-12)

You are only required to assess conditions and facilities on the chosen deck. This applies to all questions in Section 5. You may sometimes observe features on the lower deck as you ascend to or descend from the upper deck but you are not required to assess the lower deck features in these circumstances.

Depending on which deck you are assessing, rate availability of seating at either 5.2 (lower deck) or 5.3 (upper deck).

*NB. You are no longer required to record the change in the availability of seating during the bus trip nor the reasons for any changes.*

#### 5.4a Cleanliness of Seating and 5.4b Condition of Seating

- Please read the detailed instructions provided on the questionnaire, noting the differences between Cleanliness and Condition.

#### 5.6a Small litter bins designed to take tickets and 5.6b Litter bins for passenger litter

- Please record if either type is provided. Sometimes one bin type is provided for both – in that case answer yes to both a and b.

#### 5.9 Customer Information and PA Announcements

- Please read the detailed instructions on the questionnaire.

### Section 6 – Quality of Ride (page 13)

#### 6.1 Appropriateness of Speed

- Please assess the appropriateness of speed - you are not expected to make a technical assessment. Consider the quality of the ride as an ordinary passenger. Read the detailed instructions on the questionnaire.

#### 6.2 General smoothness of ride

- Please assess this adopting a similar approach as for 6.1.
- The rating scale descriptors for Zero and 2 were slightly changed from Q1 in April this year. Mounting the kerb should now be scored Zero rather than 2.

### Section 7 – Bus Exterior (page 14)

**7.1a Route number/destination information on the Back and Side of the bus**

- Is it an electronic display or an old style mechanical blind?

**7.1 Clarity of Route number / destination blinds on the Back and Side of the bus**

- Read the instructions and scale descriptors on the questionnaire carefully. Note that electronic displays that are working correctly should generally score 10.

**7.2 Cleanliness and 7.3 Graffiti**

- Read the detailed instructions on the questionnaire.

**Section 8 – Alighting from the bus (pages 15-17)**

**8.1 Was the bus stop obstructed in any way?**

- As when boarding the bus (Section 3), note that other buses using the stop or nearby stops do not count as obstructions for the purpose of this survey.

**8.2 Closeness of bus to kerb**

- Please read the detailed instructions provided on the questionnaire – these are consistent with 3.2 which measures closeness to kerb when boarding.
- Similarly, please exercise judgment in scoring this as already described for 3.2 on page 6.

**8.3a Bus Licence Number and 8.3b Vehicle Registration Number**

- Note that both numbers should now be recorded. Please try to record both numbers – if this is difficult, please try to get the vehicle registration first. These numbers are required for visit verification purposes.

**8.3a Bus Licence Number**

- Generally a number no longer than 5 digits. It is most often found to the right of the main entrance and exit door at the front of the bus. If you are unable to find the bus licence number then please leave this question blank.

**Measuring the punctuality of the bus departure at the alighting point (8.4 and 8.4a, b and c)**

Please take care to study the following questions and ensure that you answer these accurately. Measuring the punctuality of the bus is a key objective of the survey.

**8.4 Scheduled time of bus departure from stop at which you alighted (NEW for Q2)**

- In order to ensure complete clarity about measuring punctuality accurately, we have added this question and you need to record here the alighting time shown on your journey plan for this stage.

The subsequent questions – 8.4a and 8.4b - are unchanged from the previous quarter:

#### **8.4a Time the bus you have just alighted from departs from this bus stop**

- Note carefully that this question and the procedure you need to follow was changed from Q1 in April.
- Last year you were asked to record the time you alighted from the bus. Now you must record the time this bus departs from this stop.
- Therefore you need to wait at the stop to observe and record when the bus departs. In most instances this will be immediately after passengers have disembarked/embarked at this stop. Sometimes the bus may wait a few minutes before departing.
- We are aware that you need to ensure you progress to your next bus stop to start your next stage assessment. If the bus waits so long at the stop after you have alighted that you would risk not getting to your next bus stop in time to assess it and catch the scheduled bus, then you should leave the alighted stop without recording the time the bus departed. In this situation leave 8.4a blank (and answer 8.4b code 4 – I left before bus departed)
- The exception to these instructions is when the alighting point is the last stop of this service. In this case please record the time you alight the bus (as it would be both impractical and not relevant to wait until the bus starts its next route).
- As with recording bus departure times described in Section 0 on pages 4-5, if you have been delayed such that you are not travelling on the scheduled bus per your journey plan, then obviously it will not be possible to record accurately whether the actual time this bus departs is earlier or later than the scheduled alighting time in the journey plan. In this case please simply record the actual time the bus departs this stop but do not answer 8.4b – leave blank.

#### **8.4b Was departure time later or earlier than the scheduled time?**

- You have to compare the actual time the bus departed – as recorded at 8.4a – with the scheduled time – as recorded at 8.4 (which should be the “alighting time” for this stage shown in your journey plan).
- There is no distinction in timetables between the scheduled alighting time and departure time for particular stops.
- The definitions of “late” and “early” compared with the schedule time were revised from Q1 in April:
  - “Later than scheduled” is now at least 6 or more minutes after the scheduled alighting time in the journey plan.

- “Earlier than scheduled” is now at least 2 or more minutes before the scheduled alighting time in the journey plan.
- Example – if the alighting time in the journey plan is 12:30, the bus is late if leaves at 12:36 or later
- Example – if the alighting time in the journey plan is 12:30, the bus is early if it leaves at 12:28 or earlier
- As noted above under 8.4a, if you have been delayed such that you are not travelling on the scheduled bus per the journey plan, you will not be able to judge whether the actual departure time from this stop is on time, later or earlier than scheduled. In this case leave 8.4b blank and please comment at 8.10 (Further comments on this stage) to explain why you were not on the scheduled bus and unable to answer this question.

#### **8.4c If later or earlier than scheduled why was this?**

- If later or earlier than scheduled, please select from the list of possible reasons shown. You may select “Other” and record in your own words.

#### **8.5 Anti-social behaviour by other passengers**

- The different types of behaviour you may experience have been grouped into four categories since Q1 April this year:
  - Threatening /intimidating behaviour
  - Concerning behaviour
  - Unsociable behaviour
  - Inconsiderate behaviour

#### **8.6 If there was ‘threatening/intimidating’ or ‘concerning’ behaviour, did driver take any action?**

- Note that this applies to behaviour on the bus (the driver is not necessarily expected to take action about behaviour at bus stops or in bus stations)

#### **8.7 What action did driver take?**

- Please describe if this occurs.

#### **8.8 Driver Behaviour**

- Check the different behaviours listed in the grid.

### **Section 9 – Your Feedback on the Journey Plan (page 18)**

Please inform us of any problems you experience or discrepancies in the information from what you observe on the ground.



We do examine this feedback and take it into account when checking/revising the journey plans for the next quarter's fieldwork using websites such as Traveline.

Please note, however, that we cannot always amend journey plans solely on the basis of assessor comments if these are not corroborated by the information contained in the websites.

Obviously all of this information is subject to change and please be assured that we make every effort to provide journey plans that are accurate. We appreciate your co-operation in maintaining and updating the journey plans as accurately as possible.

### **13. Reporting your Results: Data collection on Cybershop**

Data collection for this project is strictly self-entry on Cybershop. Be sure to save your paperwork for a minimum of 3 months. This will ensure that we can obtain results from you in the event that there is a problem with the system or we need to check any information at a later date.

To read general instructions on how data entry works, log on and click on help and then 'How to use Data Entry'.

To enter your results go to your scheduled visits page and click on 'enter' in the results column for the relevant assessment. You will be asked to type in the VIN number of the assessment and then the date your assessment was made. After this, you can read the specific typing rules for the project and then enter your results.

Once you have submitted your results a validation check is run to look for any inconsistencies in your answers. If there are any, you will be told what is incorrect and given the opportunity to change your answers if needed. Not every assessment goes according to plan, so you may need to skip the validation but you will need to give a reason for this.

Once you are happy with your answers, a spell check will run, the visit will then be removed from your scheduled visits page and your job is completed. Complete a pay claim form and return it to the office with receipts attached to ensure you are paid promptly.

### **14. Problems and Feedback**

If you have any issues you would like to communicate to GfK please e-mail [PFO@gfk.com](mailto:PFO@gfk.com)

### 3. Journey Plan

Passenger Focus MYSTERY TRAVELLER SURVEY: Journey Plan Q2 10/11						
Journey Reference:			04.01			
Journey Date:			Monday - Friday			
Journey Time:			Morning Shift - 7:30 to 13:00			
STAGE	01	VIN: 3962949	Bus Co.	Arriva	Bus No.	X21
Direction:	N		Destination: Newbiggin			
Payment:	DayPass					
	Boarding			Alighting		
Area	Newcastle City Centre			Gosforth		
Road	Northumberland Rd			High Street		
Stop Description	Harmarket Bus Station, stand W			High Street		
Time	7:40 AM			7:48 AM		
Next bus due (mins)	30			-		
Grid Ref Easting	424750			424250		
Grid Ref Northing	564250			568250		
Additional Information: -						
Time between alighting and departure of next stage:				9 minutes		
STAGE	02	VIN: 3962950	Bus Co.	Arriva	Bus No.	56
Direction:	N		Destination: Tynemouth			
Payment:	DayPass					
	Boarding			Alighting		
Area	Gosforth			Longbenton		
Road	West Jesmond			West Farm Avenue		
Stop Description	Great North Road			Longbenton Shops		
Time	7:57 AM			8:06 AM		
Next bus due (mins)	25			-		
Grid Ref Easting	424415			425750		
Grid Ref Northing	567977			569250		
Additional Information: Additional Information: for next stop: head west on West Farm A, past Monks Park Way for approx 400m and then Salters Lane is on the Right hand side.						
Time between alighting and departure of next stage:				20 minutes		
STAGE	03	VIN: 3962951	Bus Co.	Stagecoach	Bus No.	X63
Direction:	NE		Destination: Newcastle			
Payment:	DayPass					
	Boarding			Alighting		
Area	Long Benton			Killingsworth		
Road	Salters Lane			West Baily		
Stop Description	BT Call Centre, Salters Lane			West Baily		
Time	8:26 AM			8:41 AM		
Next bus due (mins)	15			-		
Grid Ref Easting	425750			427028		
Grid Ref Northing	569250			572420		
Additional Information: -						
Time between alighting and departure of next stage:				17 minutes		

STAGE	04	VIN: 3962952	Bus Co.	Stagecoach	Bus No. 62
Direction:	S	Destination: North Walbottle			
Payment:	DayPass				
		Boarding	Alighting		
Area		Killingsworth	Four Lane Ends		
Road		West Baily	Benton Lane		
Stop Description		West Baily	Four Lane Ends Metro		
Time		8:58 AM	9:15 AM		
Next bus due (mins)		15	-		
Grid Ref Easting		427028	427250		
Grid Ref Northing		572420	568750		
Additional Information: -					
Time between alighting and departure of next stage:				21 minutes	
STAGE	05	VIN: 3962953	Bus Co.	Arriva	Bus No. 55
Direction:	NE	Destination: Newcastle			
Payment:	DayPass				
		Boarding	Alighting		
Area		Benton	Benton		
Road		Benton Lane	Forest Hall		
Stop Description		Four Lane Ends Metro Interchange Std B	Feetham Avenue N/b		
Time		9:36 AM	9:48 AM		
Next bus due (mins)		15	-		
Grid Ref Easting		427250	430250		
Grid Ref Northing		568750	569750		
Additional Information: -					
Time between alighting and departure of next stage:				29 minutes	
STAGE	06	VIN: 3962954	Bus Co.	Go North East	Bus No. 81
Direction:	S	Destination: Cramlington			
Payment:	DayPass				
		Boarding	Alighting		
Area		Benton Square	Wallsend		
Road		Off Whitley Road	Station Road		
Stop Description		Benton ASDA	Hadrian Lodge		
Time		10:19 AM	10:30 AM		
Next bus due (mins)		20	-		
Grid Ref Easting		430250	429750		
Grid Ref Northing		569750	566250		
Additional Information: -					
Time between alighting and departure of next stage:				15 minutes	
STAGE	07	VIN: 3962955	Bus Co.	Go North East	Bus No. 40C
Direction:	E	Destination: Wallsend			
Payment:	DayPass				
		Boarding	Alighting		
Area		Wallsend	Howdon		

Road	Station Road		Howdon Lane		
Stop Description	Std 2		Howdon Metro		
Time	10:45 AM		11:14 AM		
Next bus due (mins)	20		-		
Grid Ref Easting	429750		432450		
Grid Ref Northing	566250		566945		
<b>Additional Information: -</b>					
Time between alighting and departure of next stage:			27 minutes		
STAGE	08	VIN: 3962956	Bus Co.	Go North East	Bus No. 17
Direction:	N		Destination: Whitley Bay		
Payment:	DayPass				
	Boarding		Alighting		
Area	Howdon		North Shields		
Road	Howdon Lane		Station Terrace		
Stop Description	Howard Street Std Q		North Shields Town Centre		
Time	10:41 AM		11:00 AM		
Next bus due (mins)	30		-		
Grid Ref Easting	432450		435520		
Grid Ref Northing	566945		568327		
<b>Additional Information: -</b>					
Time between alighting and departure of next stage:			9 minutes		
STAGE	09	VIN: 3962957	Bus Co.	Go North East	Bus No. 75
Direction:	W		Destination: Newcastle		
Payment:	DayPass				
	Boarding		Alighting		
Area	North Shields		Battle Hill		
Road	Station Terrace		Tyne Met Coast Road Campus		
Stop Description	Rudyard Street Std D		Battle Hill North Tyneside College		
Time	12:19 PM		12:38 PM		
Next bus due (mins)	30		-		
Grid Ref Easting	435520		431575		
Grid Ref Northing	568327		568270		
<b>Additional Information: Walk 5 minutes, Battle Hill North Tyneside College</b>					
Time between alighting and departure of next stage:			9 minutes		
STAGE	10	VIN: 3962958	Bus Co.	Go North East	Bus No. 308
Direction:	SW		Destination: Newcastle		
Payment:	DayPass				
	Boarding		Alighting		
Area	Battle Hill		Newcastle City Centre		
Road	Battle Hill Drive		Percy Street		
Stop Description	Tyne Met Coast Road Campus		Newcastle Haymarket Bus Station Metro		
Time	12:47 PM		1:04 PM		
Next bus due (mins)	15		-		
Grid Ref Easting	431575		424760		
Grid Ref Northing	568270		564757		

#### 4. Data Validation

0-1 - Date of Journey must be between 07/06/2010 and 09/07/2010  
SQL 0-8 and 0-9 are more than 1 hour apart  
If 1.1a is N, 1.1e must be NA  
0-4 must be between 1 and 10  
If 1.1a is N, 1.1f must be NA  
If 1.2a is N, 1.2b must be '-'  
If 1.3a is N, 1.3b must be '-'  
If 1.2a is Y, then 1.2b must not be '-'  
If 1.3a is Y, then 1.3b must not be '-'  
IF 2.1a is NA, 2.1 must be NA  
IF 2.1a is NOT NA, 2.1 must NOT be NA  
IF 5.1 is 1 – Single Decker/Articulated or 2 – Lower deck of double decker,  
5.2 must NOT be NA  
5.1 is 1 - Single Decker / Articulated or 2 - Lower deck of Double Decker,  
therefore 5.3 must be '-'  
If 5.1 is 3 (Upper deck of double decker), 5.2 must be '-'  
If 5.1 is 2 (Lower deck of double decker), 5.2 must not be '-'  
If 5.1 is 3 (Upper deck of double decker), 5.3 must not be '-'  
If 5.1 is 2 (Lower deck of double decker), 5.3 must be '-'  
IF 7.1a is NA, 7.1 must be NA  
IF 7.1a is NOT NA, 7.1 must NOT be NA  
IF 0-14 = Cash , 4.2 must be N/A Paid cash  
IF 0-14 = Day Pass/Other, 4.2 must NOT be NA  
0-3 Journey reference no – MUST BE IN FORMAT XX.XX ( 2 digits + 2  
digits, no letters)  
SQL 8-4a must be after 0-9

## 5. Proofing Instructions

### Passenger Focus Proofing Doc PFO12166

GfK has been commissioned by Passenger Focus to conduct a Bus Mystery Traveller Survey in nine areas of England outside London. The objective is to assess the level of service provided to bus travellers in each of the nine areas.

Assessors are required to undertake a number of specific bus trips which have been arranged into a “journey plan”. They are provided with exact instructions of which bus stops and which bus routes to use for each journey plan and they should stick to this plan as far as practicable.

Proofers need to ensure that the following are correct:

0-3 'Journey Reference No.' matches attribute

0-4 'Stage within Journey' matches attribute

If 0-4a 'Did you complete this stage within the assessment' is No, proof any comments and leave in status 'ready to proof'

0-6 'When did you arrive at this bus stop' – must be earlier than 0-8 'Scheduled time of bus departure'

0-9 'Actual time of bus departure' – should be later than 0-7 and 0-8

8-3a & 3.3b – Licence No. and Reg. No – must be capitals – incompletes acceptable but not more than 3 for a complete journey (e.g. GX??123)

Check registrations numbers via website: <http://www.buslistsontheweb.co.uk/>

Ensure they match operator and area. If more than 3 missing/wrong in any journey add to query log for account team to investigate

8-4a 'What time did the bus you have just alighted from leave the bus stop' – must be later than 0-9

8.4b – must be 'As timetable' if within two minutes earlier or within 6 minutes later of 'Visit Attribute Arrival Time'

8.4b – must be 'Later' if time is 6 minutes later than 8.4a

8.4b – must be 'earlier' if time is 2 minutes earlier than 8.4a

Punctuality is one of the most crucial aspects of this survey so responses for 8.4b must be accurate and reflect the service. If an assessor has missed the scheduled bus and has had

to take the next, or even use a different service altogether, they have to take this into account when measuring whether the bus they have alighted from leaves as timetable or is late or early. You will not have access to timetables but the length of the journey is an attribute on the system and by adding it to the time recorded at 0-9, you can establish how 8.4b must be scored.

If any timings are out of synch proof comments but leave in 'ready to proof' with brief Iris note

Verbatims:

No need to have complete / grammatically perfect sentences - just need to be tidied up.

If there is a problem with the route we need to be aware so check comments for clarity  
Note that times are validated by the system but account team need to be aware of individual assessors who are consistently inputting incorrect times.