

Bus passenger views on value for money

October 2013



Foreword

The cost of fares and the ease of buying tickets are key parts of the bus passenger 'experience'. Our research in 2010 found that improving value for money was one of the top priorities for improvement while our work on bus passenger satisfaction shows that, on average, just over half of those surveyed were satisfied with value for money.

We wanted a better understanding of what passengers actually thought about value for money, what had the biggest influence on their perception and, importantly, what might help to improve things.

In particular we wanted to find out more about what 16-19 year olds thought, as they had lower satisfaction with value for money on buses. This is a big market for the bus industry so there is real benefit in knowing what makes them 'tick'.

The key findings of this new research are listed below.

- The 'core' product is all important. When passengers buy a ticket they expect a punctual, reliable service and a seat in return – something that can easily be forgotten when looking at fares and ticketing initiatives. Focusing on performance will also improve perceptions of value for money.
- Better access to information is essential. Passengers relied on word of mouth and the bus driver for information on times, routes and fares. How much business is lost because potential passengers simply don't know how to use the bus or because people can't find the ideal ticket for their needs?

Passengers didn't realise what ticket types existed, how they could buy them or where they could find out the information they needed. The research found a very strong desire for more centralised sources of information. For example websites, apps and notices on the bus. It also emphasised the importance of live updates on bus running – something also found in our research on disruption.

- The bus driver is the face of the company. One feature shone through all this work – the driver is responsible for far more than driving the bus. They are the main source of information on fares, the provider of information on delays and disruption, and a reassuring presence when it comes to personal security.

The driver's attitude can make a big difference – so good training in customer service is essential.

- Younger passengers have very distinct needs. They rely on buses, need more flexibility (to balance work, education and seeing friends) and often take journeys spontaneously.

They also resent paying adult fares when they are still at school/college or on low (or no) incomes. They want this reflected in the fares that they pay – with adult fares only kicking in from 18 onwards.

We will now work with the bus industry, transport authorities and the Government to ensure that the issues highlighted in this research are addressed.

Colin Foxall CBE
Chairman
Passenger Focus

Recommendations

1. Make it easy for people to use the bus

- Information is key. We need to reduce the amount of time passengers waste in waiting for buses and in trying to find out where buses go or how much they cost. The easier it is to use buses, the more people may do so.
- There is a need for a central, amalgamated pre-journey information source where passengers can find out more about fares, ticket types and bus route information across different bus operators in an area.

“I tried to look online for ticket fare and types but it was so confusing. I just asked my mates what they were getting in the end.”

Bristol, 16-18 year olds, work/apprenticeship/education

- Such a resource would provide passengers with the tools and knowledge needed to make accurate decisions regarding their bus travel, reassuring passengers that they have made the right travel choices. It would also act as a marketing tool for irregular or non-users. Websites and apps lend themselves well to this type of function, but information still needs to be available via more traditional methods such as leaflets at bus stops and on buses to ensure that those without access to computers are not alienated.
- On the day itself passengers want real-time information. As we said in our bus disruption research, bus passengers want accurate, timely and relevant information to tackle the powerlessness currently felt, allowing them to relax in the knowledge that their bus is just around the corner – or to make an informed decision about what they do if it is not.
- As with our research on *Bus passenger experiences of delays and disruption*, Passenger Focus recommends the following:
 - that it becomes a specific Government objective to establish the ‘back-of-house’ infrastructure that will allow real-time bus departures information to be provided in all parts of the country
 - with this critical ‘enabler’ in place, that there should be a long-term programme to install displays giving real-time departures information at as many individual bus stops as possible
 - using the data already generated (see first recommendation), that the opportunities through smartphone and tablet applications (apps) to provide real-time departures information in passengers’ pockets before they get to the bus stop should be exploited to the full
 - that bus companies, transport authorities and the Government consider how communication with passengers already on board a bus can be dramatically improved.

2. Driver training

- Drivers play a key role in passengers' experiences; they are the face of bus companies. Passengers rely on them to sell them the best fare, but also to demonstrate good customer service.

“If he can see me near the bus stop, he will stop and pick me up, he’s really good like that.”

Staffordshire, 56-62 year olds, commuter

“My bus driver doesn't say that you can save money on this, that, and the other. They're not that helpful when it comes to value of tickets.”

Leeds, 36-55 year olds, leisure

“Because bus drivers normally are really moody, to have that bus driver who was really friendly, it was just a real shock... It’s just better customer service isn't it, making you feel like you're valued.”

Leicester, 19-25 year olds, work/apprenticeship/education

- Passenger Focus recommends that the bus industry takes further steps to develop a customer service ethos among drivers, recruiting for the right attitude and with regular training to help drivers think as if in the shoes of the passenger. Bus companies are in an excellent position to improve passenger satisfaction through their drivers.

We know from the Bus Passenger Survey (BPS) that some operators get really good driver results; this best practice customer service should be adopted by other operators.

3. Younger passengers

- The youth market is an important area for bus companies – but can they do more to increase demand? Products that reflect the flexibility required by younger people will help, so too will developing marketing channels that match younger lifestyles. Not only could these help to increase demand but they may even help to retain it as they pass into adulthood.

However, the key sticking point for many younger passengers is fares; specifically, being classed as an adult when neither their circumstances nor their incomes reflect this. Some local authorities and bus companies offer discounts to the 16-18 age group and these are welcome – but there is a need to take a more standardised approach to youth fares.

This does not necessarily mean looking for subsidy – indeed we believe there is a need to look at whether youth fares can be commercially viable in their own right, perhaps offering lower fares which could generate more demand and more income.

“Why should we pay an adult fare when we are not adult? We are teenagers and should be recognised by bus operators as younger passengers.”

Bristol, 16-18 year olds, work/apprenticeships/education

There needs to be better information around fares for younger people, as well as a standardised age for paying adult fares.

Passenger Focus will continue to collect and promote good practice, in particular using our website as a resource to show success stories.

Background

Analysis from the BPS gave Passenger Focus information on passengers' behaviours and attitudes around bus fares and perceptions of value for money; this can be found on the Passenger Focus website. In particular:

- passengers are most satisfied with tickets that provide flexibility
- value-for-money decline ratings throughout the day
- waiting for a bus longer than expected has a large impact on value-for-money ratings
- younger passengers are least satisfied with value for money
- there is a wide difference in satisfaction between areas.

However, further research was required to dig deeper into what impacts these perceptions, and how to improve them. Passenger Focus consulted with the Youth Parliament to understand how value for money and fares affect young people by understanding their needs, experiences and attitudes concerning bus usage and fares.

Passenger Focus commissioned SPA Future Thinking to carry out research to understand what drives bus passengers' satisfaction with value for money. This is to help Passenger Focus, the Department for Transport (DfT), and the bus industry to identify best practice and potential improvements. This research is timely as many local authorities are experiencing reduced budgets, meaning the amount that they have available to subsidise bus services may be reduced.

Management summary

Our research showed that the parts of the bus journey experience that have the strongest impact on value for money are:

- punctuality
- frequency
- the ability to board the first bus
- the provision of up-to-date and accessible information.

Compared to other modes of transport, most passengers consider the bus as a more cost-effective mode of travel. However, the research shows there is potential for operators to increase perceptions of value for money by improving key parts of the bus experience. There is particularly high potential to deliver better value for money to younger passengers who currently feel undervalued, especially those in areas where they are required to pay adult fares and are not recognised as young passengers.

Information on fares and ticketing

Passengers feel that information regarding ticketing, timetabling and routes is limited and are unsure where to find this information. Passengers require better, centralised information sources and communication to help them make educated decisions, either pre-journey, around the best ticket/fare to purchase, or during the journey.

Passengers in rural areas in particular have an unmet need for real-time information on bus times - either using an app or a screen at the bus stop.

There is limited knowledge of ticket types available, due to a lack of awareness of information resources and/or poor performance of those that exist. Passengers that we spoke to requested a centralised information resource both online and offline to provide them with appropriate tools with which to make their fare or journey decisions.

The provision of ticketing information online (as a website or an app) is especially important and passengers expect bus operators to have a central website in the same way that information on all rail journey fares can be found on central sites such as National Rail Enquiries or the Trainline.

Due to the lack of centralised information sources and the perceived lack of alternatives, passengers rely heavily on the bus driver for all bus-related information; from the best value ticket, route, travel information and live updates to the actual ticket purchase. The lack of a centralised resource can be particularly frustrating in cases where the driver is unable to provide enough or provides incorrect information, as passengers are unsure where else they can source this information.

Within the group sessions, passengers were made aware of the array of ticket types on offer and none were fully aware of the offers in their area prior to the research, due to this lack of clear central resource. Passengers were generally left feeling confused and overwhelmed, resulting in them questioning whether they are currently purchasing the

correct ticket type for their journey and, most importantly, whether they are purchasing the cheapest ticket available. Many respondents requested copies of the materials listing the ticket types to use/share after the session. This supports a need for clearer communication and descriptions of the individual fares and ticket types available.

During the journey

Younger passengers have specific needs, which particularly need to be addressed. Flexibility is key, reflecting the spontaneity of their daily lives. They often do not know where they will be travelling to throughout the day, thus tickets that accommodate this need for flexibility are vital.

Younger passengers also resent that when paying for bus tickets, they are recognised as adults and not young passengers; they feel that their low/no income should be reflected in the fare they pay. In particular they feel they should not be paying an adult fare until the age of 18. This was especially the case for younger passengers living in Bristol and Manchester where there are currently no youth schemes in place.

Core objectives

- Understand bus travel needs and behaviour, in terms of both ticketing and service
- Explore drivers and barriers to perceptions of value for money
- Gauge reactions to potential new initiatives
- Understand the needs of younger passengers and perceptions of youth schemes.

Methodology

All respondents were currently using a bus at least once every two months. In order to gain a representative sample this was split by those using the bus for commuting or leisure as well as those living in rural and urban areas.

Pre-tasking: my bus diary

Respondents were asked to complete a pre-task. This provided detailed feedback on individual bus journeys on a number of urban and rural routes. We also asked respondents to bring their most recent bus ticket to the research session, to aid discussion.

My Bus Travel Diary
Please tell us about each journey you make by bus this week

Journey	Date	Bus Route	Purpose of journey	Ticket type, price	What was good about the journey?	What was not so good?
Journey	21/10/13	134	going to work	4.50	ON TIME - BUT BUS DRIVER TOOK A LONG TIME TO GET TO THE STOP	WELL WENT ON THE JOURNEY
Journey	22/10/13	134	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	23/10/13	134	going to work	5.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	23/10/13	59	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	23/10/13	134	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL

My Bus Travel Diary
Please tell us about each journey you make by bus this week

Journey	Date	Bus Route	Purpose of journey	Ticket type, price	What was good about the journey?	What was not so good?
Journey	21/10/13	59	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	21/10/13	134	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	21/10/13	134	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	21/10/13	59	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL
Journey	21/10/13	59	going to work	4.50	DRIVER WERE VERY POLITE AND HELPFUL	DRIVER WERE VERY POLITE AND HELPFUL

Your Views on Bus Travel
Please answer the following questions relating to your overall experiences of travelling by bus

Please tell us what you like about travelling by bus:

- I like the fact that it's so easy to use
- I like the fact that it's so easy to use
- I like the fact that it's so easy to use

Please tell us what you don't like about travelling by bus:

- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use

What could be improved about your local bus service?

- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use

Thinking of your journey overall this week, do you feel that the amount you pay for the bus is fair?

- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use
- I don't like the fact that it's so easy to use

Mobile pre-task

One or two respondents per group completed a Be-There mobile pre-task – this is an app which records pictures and videos of passengers' bus journeys. This helped paint a picture of passenger experiences and highlight key issues

12 x 1.5 hour bus Passenger Focus groups

The sessions gave the opportunity to explore passenger understanding of bus fares, and what impacts their perceptions of value for money, in an open discussion. They also presented the opportunity to gain feedback on schemes for young people and evaluate initiatives across the operators.

Sample

Who we spoke to

	Location	Ticket Type	Age	Sample Status*	Date
Group 1	Bristol	Commuter	16-18	Work/Apprentice/Education	28 Jan
Group 2	Manchester	Commuter	26-35	C2DE	24 Jan
Group 3	Leeds	Leisure	16-18	Work/Apprentice/Education	4 Feb
Group 4	Nottingham	Commuter	36-55	BC1	31 Jan
Group 5	Bristol	Leisure	56-62	BC1	28 Jan
Group 6	Manchester	Commuter	16-18	Work/Apprentice/Education	24 Jan
Group 7	Leeds	Leisure	36-55	C2DE	4 Feb
Group 8	Nottingham	Leisure	19-25	Work/Apprentice/Education	31 Jan
Group 9	Stafford	Commuter	56-62	C2DE	31 Jan
Group 10	Stafford	Leisure	16-18	NEETs	31 Jan
Group 11	Leicester	Commuter	19-25	Work/Apprentice/Education	5 Feb
Group 12	Leicester	Leisure	26-35	BC1	5 Feb

*Please see the Social Grade Definition Table in the Appendix

Recruitment criteria

The groups were made up as follows:

- eight respondents per group
- mix of gender per group
- one to two per group conducted a mobile pre-task
- a mix of urban and rural routes, defined by where they board the bus, whether they consider themselves urban or rural dwellers and the frequency of buses from that stop

Getting to a bus stop is also much easier than getting to a train station as they are generally close by. The cost of a bus journey is also felt to be cheap when compared to other modes of transport such as the train, car and taxi.

“Simply because it is easier on the bus. I don’t have to worry about finding a car parking space, and it’s simpler with two kids. I find it nice that on a Saturday, I can just get on the bus and spend an hour and a half, just sit there reading my book.”

Leeds, 36-55 year olds, leisure

When commuting to work, speed is key and bus users tended to find that the bus is the quickest during rush hour traffic due to their ability to use bus lanes.

“Buses have obviously got the bus lanes, so you’d get into town quite a lot quicker, than obviously being stuck in traffic lights, or in heavy traffic when they can just go straight down the bus lane.”

Leicester, 19-25 year olds, work/apprenticeships/education

“Buses are often quicker because they can use bus lanes and they drop you off right outside your door, you can’t beat that.”

Bristol, 19-25 year olds, work/apprenticeships/education

1.2 Bus versus other modes of transport

Passengers consider a number of factors when deciding which mode of transport to take; cost is important but comfort, speed and convenience are also considered. The table overleaf illustrates the advantages and disadvantages, and the occasions each mode of transport is typically used.

In most cases the bus tends to be seen as a cheaper option than other modes of transport and this often outweighs any issues passengers might have with the bus. Even passengers with no access to a car still compared the costs of using the bus to using the car when calculating value for money.

“I quit driving 18 months ago, the cost for the whole year compared to the cost of the Kangaroo card would have hardly covered my car insurance and MOT let alone petrol and repairs.”

Nottingham, 36-55 year olds, commuter

Passengers also take into account comfort, speed and convenience once cost has been addressed. Being comfortable on the mode of transport is quite important and if consistent discomfort is experienced, such as being unable to get a seat, the bus being overcrowded, or passengers feeling unsafe, then another mode of transport will be explored. For commuters speed is of the utmost importance; they need to get to work quickly and on time and any chosen transport must achieve this.

Convenience is a subjective element of the decision-making process; the distance to the nearest mode of transport and its ability to get the passenger as near as possible to their destination are key.

	Advantages	Disadvantages
Bus	<ul style="list-style-type: none"> • cheap – versus train/taxi • quick – use of bus lanes, cuts out traffic • convenient – often quite near to home • routes convenient and easily accessible - lots of stops/options • relaxing – once you're on the bus and you have a seat you can let the bus take the strain 	<ul style="list-style-type: none"> • unreliable – often late • other passengers – can be irritating, and this is noticed more so on the bus than other modes • expensive – for some regions buses are costly • inflexible payment methods – can feel restrictive • lack of real-time information provided – can be frustrating • crowded – during rush hour.
Train	<ul style="list-style-type: none"> • fast – quicker than bus or car • comfortable surroundings – not cramped • relaxing – don't need to concentrate as would if driving • reliable – no traffic as such • fewer stops – greater distances between station • real-time information – driver keeps passenger up to date • punctual – mostly seem to run on time • food and drink options on board – more relaxing. 	<ul style="list-style-type: none"> • hard to get a seat in rush hour • expensive – versus the bus • inconveniently located stations – can be a longer walk than to the bus stop • inconvenient routes – more likely to have to walk/get a bus from the final destination station than if on a bus.
Car	<ul style="list-style-type: none"> • freedom – no need to think about anyone else's needs • convenient – door to door • flexibility – there if needed • warm – from house to car, no need to walk too far • comfortable surroundings – radio/music • room for baggage – boot/back seat • own space – no need to feel squashed/encroached upon. 	<ul style="list-style-type: none"> • parking- expensive, hassle/stressful to find a place • expensive to run – petrol, parking, upkeep, insurance • traffic – during rush hour.
Tram	<ul style="list-style-type: none"> • modern • clean • fast – has its own lane • frequent – plenty of choice • minimal delays – runs on time, not reliant on traffic 	<ul style="list-style-type: none"> • not all have access - fewer stations than other modes of transport, all in urban areas.

	<ul style="list-style-type: none"> • real-time information – driver can update. 	
Taxi	<ul style="list-style-type: none"> • a treat – expensive so used infrequently • direct - door to door • cost effective if travelling with a group – can share the cost • safety reassured – booked before used or black cab used so feel safe using. 	<ul style="list-style-type: none"> • usually most expensive – versus bus/train • a bit indulgent – expensive so a treat only.

	Reason for journey - commuter	Reason for journey – leisure traveller
Bus	<ul style="list-style-type: none"> • to commute to and from work and education. 	<ul style="list-style-type: none"> • bad weather (particular snow and ice) versus the car • going out drinking/going out after work – easy way to get into town and home again, when unable to use the car • shopping at the weekend – don't want the hassle of finding parking.
Train	<ul style="list-style-type: none"> • need to be somewhere fast – getting to work can be a priority • travelling a further distance – want to get there quickly and longer distances perceived to be better value for money. 	<ul style="list-style-type: none"> • long-distance journeys – so want to get there as quickly as possible.
Car	<ul style="list-style-type: none"> • bad weather - excluding snow where bus is more likely to be used • running late – so speed is of the essence. 	<ul style="list-style-type: none"> • with the kids on a family trip – so need space for extra passengers and luggage • lots of bags/luggage • travelling with others who dislike public transport.
Tram	<ul style="list-style-type: none"> • if available can be faster as not affected by traffic. 	
Taxi	<ul style="list-style-type: none"> • used very rarely but may be called upon if running late and no access to a car. 	<ul style="list-style-type: none"> • planned in a group situation – to keep costs down • if miss the bus/last train on a night out – need to get home somehow.

1.3 In their own words: advantages of the bus versus other modes

“It’s nice to have a drink and know that I can get home safely on the bus.”

Nottingham, 36-55 year olds, commuter

“That is why I use the bus. I find the parking in Leeds is atrocious. If you are there all day, then it’s about £14.”

Leeds, 36-55 year olds, leisure

1.4 How travel has changed over time

Travel attitudes and behaviours have changed over time due to changes to the economy and passengers' lives.

The economy has made commuters much more price sensitive and cost has become a more crucial factor. Passengers are more likely to budget in general and have become more cautious about how they spend their money. They are more likely to plan and research the most economical way to travel, trying to save money where possible.

“I suppose you compare it to your groceries, as well. A lager is £3.50, so you can compare it to that, can't you? £3.80 to go all the way to Leeds and back, which is pretty good value for money.”

Leeds, 36-55 year olds, leisure

Some passengers have even sold their car due to high running costs and ever-increasing petrol prices, while those who still own a car reported often taking the bus instead due to high parking fees.

“I have passed my test, but I can't afford a car or the insurance and everything that comes with it.”

Manchester, 16-18 year olds, work/apprentice/education

Younger passengers are particularly cost conscious due to their low/no income and some are still in education. As these passengers get older, they are more likely to have access to other modes of transport such as a car, either through learning to drive themselves or by having friends that can provide them with lifts. This then results in passengers benchmarking the cost of travelling by bus against the cost of travelling by car.

The bus generally delivers more favourably in terms of cost versus the car. However the comparison to the car also highlights comfort and convenience elements that can be lacking when travelling by bus. For example overcrowded and late-running buses.

“Friends have recently learned to drive, so I can now grab a lift with them if it's quicker.”

Bristol, 16-18 year olds, work/apprenticeships/education

In contrast, as passengers get older (50+ year olds), public transport such as buses and train services are used more frequently as their lifestyles change. For some this will be because they are travelling socially more frequently and thus are happy to use public transport as it is often a cheaper option and they are less time pressured when travelling. For others, it is simply that a car is no longer affordable after retirement. Older passengers report being encouraged to take public transport by discounted fares, which makes the bus even more cost effective versus other transport modes. The Club 55 card in Nottingham is an example of this.

In addition, those who have been made redundant or feel less stable in their jobs are also more likely to use the bus due to lower cost versus running a car, as a car can feel like a big commitment, especially in terms of more 'hidden' maintenance costs such as servicing and vehicle excise duty.

2 Bus fares and ticketing

2.1 Bus ticket purchase methods

Passengers buy their tickets in three main ways:

- from the bus driver
- from bus operator websites
- in person via a shop or newsagent.

The bus driver is the main purchase source for the majority of passengers, largely due to a lack of knowledge of any other source, with the expectation that they will be able to advise on the best ticket for their journey when required.

Most passengers bought their ticket whilst boarding the bus as it is seen to be an easy and convenient method and prevents having to spend any extra time before boarding the bus deciding upon and purchasing a ticket.

Passengers purchasing online tended to use this method to buy weekly or monthly tickets (or those in Nottingham topping up their pre-loaded card) as they will often research ticket prices online anyway and they do not want to carry large amounts of money to purchase from the bus driver. However, this is a minority of passengers - most were not aware of this payment option and some avoid going online due to finding the bus operator websites confusing. A minority are wary of putting their bank details into the online system.

Passengers in Nottingham with pre-loaded cards (Mango) were topping up at newsagents and shops. Typically, shops/newsagents are not locations that most would expect to buy a bus ticket from.

Passengers were not buying tickets at travel centres or bus stations as these are not located close to where passengers board/disembark the bus, meaning they are felt to lack convenience and practicality.

2.2 Fares and route information

Passengers think that bus operators are not providing them with sufficient ways to access information regarding their journey, including routes, tickets and fares, therefore little research and planning is conducted before taking the bus.

When personal knowledge is lacking, there is huge reliance on the bus driver. The majority feel that drivers are the 'face' of the bus operator and the expert in fares/ticket types. They therefore expect that asking the driver is the best way to get the cheapest fare for their journey.

Passengers will also ask the bus driver about routes and use his/her knowledge to get them to their destination when conducting an unfamiliar journey. This reliance means that many become frustrated when they feel the bus driver has not given them full or correct information.

In addition, some passengers will consult friends and colleagues on the fare types and routes available for an unfamiliar/new journey as they are unsure where else to go to obtain this information. However, this does risk being inaccurate.

For those who attempt to research their journey/fare, there is a feeling that there are a number of barriers that prevent this or make the process more difficult.

Passengers said they had not been given advice or information on where to look. Many are frustrated that there is no central website which passengers can use to access all bus information, including fares and routes for all bus companies in the area. Instead they have to go to individual bus operator sites. In fact, few were aware that this information was available at all.

Passengers expect that a bus website should work in the same way as train websites like National Rail Enquiries, that is provides information for all services on one site.

Bus company websites were felt to be confusing; this was driven by a number of factors:

- navigation is difficult and information is hard to find, plus websites are often felt to be outdated and featuring unsophisticated tools
- information seems out of date compared to what passengers already know
- route maps provided online are not very easy to decipher – they are often in the format of a PDF file which can be hard to read
- no electronic journey planner where start and destination can be put in and the best route calculated.
- paper-based information such as route maps on bus stands can be difficult to understand and don't always show all stops on the map.

“I don't know, their websites seem just really basic and not very straightforward at all. Trying to find like, bus times from Stanton, it's like a mission.”

Leicester, 19-25 year olds, work/apprenticeships/education

“They included the times on the website... but they were out of date, so that was no good.”

Bristol, 56-62 year olds, leisure

When combined, all these factors mean that most don't even think about 'researching fares', so they just pay as they use or buy the easiest to understand pass if they know they will be using the bus more often.

“I just ask the driver what ticket I need, I wouldn’t know where else to ask really.”

Stafford, 56-62 year olds, commuter

“I tell the bus driver where I am going and he tells me what ticket I need and how much it is. I then give him the money and get my ticket.”

Leicester, 26-35 year olds, leisure

“If I get the bus, I expect the driver to tell me the price of it.”

Leeds, 36-55 year olds, leisure

“I got my information off my nephew, who told me which buses to get and how much they were.”

Leeds, 36-55 year olds, leisure

2.3 Ticket types

Across all locations, there was low awareness of the ticket types available. Each group was provided with information on the range of different ticket types available in their area. Once passengers were made aware of this choice, most were surprised by how many options there are available in their area, but slightly overwhelmed by the information:

- the large choice of ticket options can be off-putting and passengers felt it would prevent them from exploring their options further due to complicated options that are difficult to understand
- the terminology used within ticket names can lack meaning and clarity in terms of how the ticket can be used therefore creating confusion. For example the name Mango card (in Nottingham) does not inform passengers how this ticket/card can be used or its purpose.
- passengers felt disenfranchised upon the realisation that some operators are cheaper than others, especially when there appears to be no explanation for this difference.

“I didn’t realise there were so many. I am confused now by what I should be getting and if I am getting the right one or not.”

Bristol, 16-18 year olds, commuter, work/apprentice/education

“There are so many different types, I don’t know where to start and what ticket I should be buying.”

Manchester, 26-35 year olds, commuter

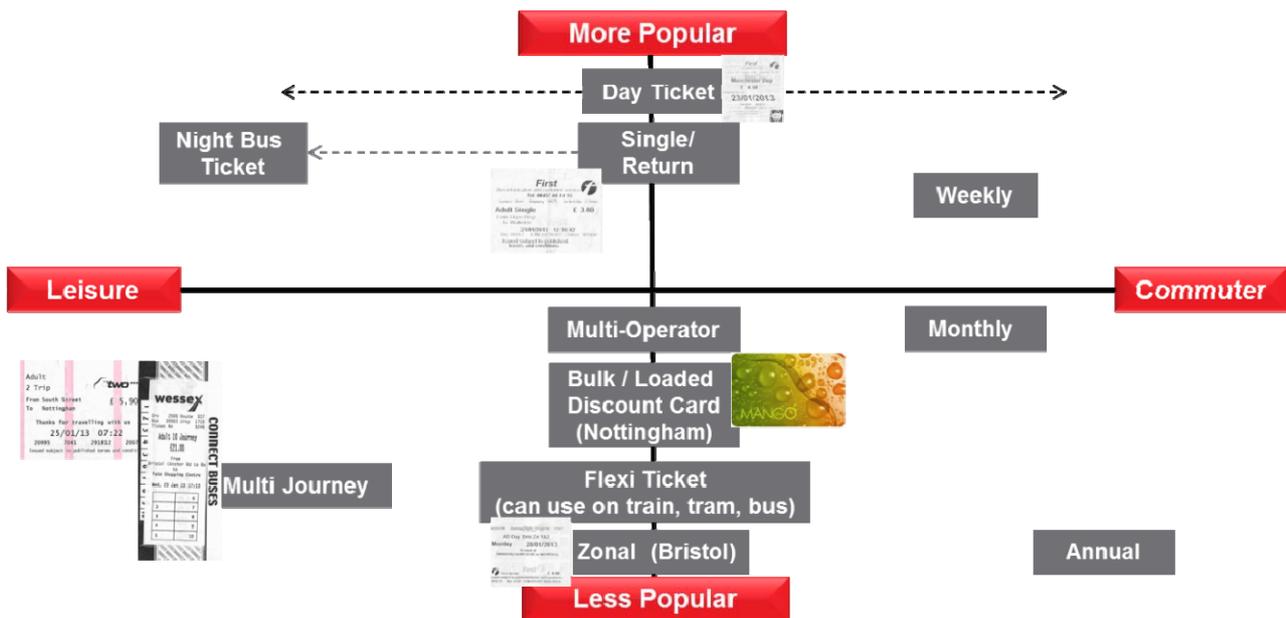
Once they realise there are alternative choices, passengers can feel hard done by and uncertain whether they are really getting the cheapest fare for their journey, which lowers their value for money perception.

Passengers require clearer, centralised information on pricing and fare types to help them feel they are making an informed decision. There is also a desire evident for more standardised fares within (and across) counties/bus operators.

2.4 What tickets are they buying?

Despite the large array of ticket types available, there are only a few key tickets that are being bought frequently across all locations: day tickets, single/return, night bus and weekly tickets. Day tickets that allow bus travel across all routes within one area are the most popular as they are felt to offer the most flexibility at a reasonable price.

Ticket types



Day ticket

- Day tickets were popular for allowing passengers to ride the bus at a set price and complete multiple journeys in one day.
- They are particularly popular with younger passengers who use buses as their main mode of transport for commuting and leisure.
- Leisure passengers also find this ticket helpful at the weekend when they are more likely to be carrying out different social events/activities in one day. Although day tickets are often more expensive than returns, passengers value the flexibility that the ticket provides and are willing to pay more for this (even if part of the ticket is not used).
- Day tickets are often felt to be value for money, especially if multiple stops are made in one day.
- One disadvantage to this ticket in a number of locations is that the ticket excludes riding the bus at night.

“The day saver works out cheaper than getting a separate ticket and it gives you more flexibility.”

Manchester, 26-35 year olds, commuter

“You can go wherever with a DayRider, so if you decide to go to a friend’s house after college you can, and then get the bus home again on the same ticket; it is good value in that way.”

Bristol, 16-18 year olds, work/apprenticeships/education

Single/return ticket

- Easy to understand and commonly used by leisure passengers in particular.
- They are often selected due to a lack of awareness of different ticket types, especially by those who rely upon the bus driver or friends for ticket advice.
- These tend to be purchased out of habit as some of these passengers are not using the bus enough to spend the time researching the best ticket to purchase.
- Commuters are also purchasing single and return tickets. This is again due to ease of use and convenience but also largely due to concerns around job security and therefore they are reluctant to tie themselves into purchasing other ticket types such as weeklies or monthlies.
- Passengers, particularly males, fear losing their ticket and the financial consequences of doing so.
- Purchasing single/return tickets is also more cost effective for those who are working part time as they do not travel enough for a weekly/monthly/annual ticket to be value for money.
- Passengers perceive return tickets to be better value for money than a single as the price increase from a single is minimal and it offers more flexibility. Thus a return will sometimes be purchased even if passengers are not certain to be making the return journey by bus.

Night bus tickets

- Night bus tickets are often purchased by leisure travellers (especially younger passengers) as a cheaper alternative to other modes of transport such as taxis.
- In addition, travelling by bus at this time means they are able to enjoy going out for a drink without having to worry about driving home.

“I quite frequently catch the night bus when I am in town and have had a few beers. It is £3.50 to where I live, and it’s so convenient. It runs on the hour every hour and they are dead on time. If you got a taxi it would be at least £10-15 so you’re saving a fair bit.”

Bristol, 56-62 year olds, leisure

Multi-operator tickets

- Both leisure travellers and commuters purchase multi-operator tickets (where available) when they need to use more than one bus operator, with the operator-flexibility of the ticket being the main attraction.
- Flexibility is especially key for younger passengers and thus multi-operator tickets are important for this group. However this ticket type does not exist in all areas.
- Passengers can become frustrated when they cannot use other tickets on multiple bus operators and feel they are receiving poor value for money when this is the case. Passengers suggested increasing value for money by introducing a ticket (smartcard) that can be used on all operators.

Weekly tickets

- A minority of commuters purchase a weekly ticket for ease of use and convenience, as they do not have to find the change to purchase a ticket every day. However, this is not a common ticket overall.
- For some passengers, the weekly ticket does not give them value for money as it does not provide enough of a cost saving versus buying individual tickets. For example, commuters who do not use the bus at the weekend do not feel they would be using the ticket to its full potential.

Monthly tickets

- A few commuters were buying monthly tickets although, as with weekly, this was not the most common choice.
- Most do not want to pay for their fare in one big sum each month and would prefer to spread their payment throughout the month.
- There is increasing concern among passengers around job security leading to uncertainty of monthly income and thus reluctance to commit to a monthly fee upfront.
- There were also some concerns from passengers (mainly males) that they may lose the ticket and their payment.

Annual season tickets

- A minority of commuters were purchasing annual season tickets, having calculated the overall cost saving of the ticket.

- A one-off payment for the whole year was felt to be an easy and convenient way to pay.
- Those purchasing an annual ticket were usually passengers who received a travel loan from their employer which was then deducted from their salary each month.
- Passengers who do not receive a travel loan from their employer were less likely to purchase an annual ticket as paying a large amount of money upfront is unaffordable.

Bulk/loaded discount card (Nottingham)

- Nottingham was the only area to have a pre-paid card system where passengers are able to upload money to the card and use this over a period of time.
- Passengers like the flexibility and convenience this method of payment provides as they can load their card as and when they have the time and money. Some were also aware of a discount they receive on fares when purchasing and spending in this way.
- However there was some confusion surrounding what this discount actually is; there is therefore a need to improve communication before and during purchase.

“The Mango card is easy; you top up at the shop or online and it’s available to everybody.”

Nottingham, 19-25 year olds, leisure, work/apprenticeships/education

Multi-modal

- Some cities, such as Manchester, offer a ticket that can be used across all modes of public transport including bus and tram.
- Passengers value the convenience this provides as it removes the need for separate tickets for each transport link.
- However this method of ticketing lacked relevance for most as few were connecting to other transport modes when they travelled by bus.

Multi-journey

- There was desire for tickets that allow a certain number of journeys across a specific period of time.
- This desire was strongest among those using the bus less frequently, who may be using the bus to travel to a destination but returning via another mode.
- Passengers value the high level of flexibility this type of ticketing provides due to the ability to use tickets as and when needed, as well as the cost saving buying in bulk can provide.

Zonal tickets

- On the whole passengers were unaware of zonal tickets, even in Bristol where zonal ticketing does exist. Generally there is a sense amongst passengers that zones can feel unfair as you might just be on ‘the wrong side’ of a zone and pay more than if you boarded a stop later.
- Passengers also fear that they will be caught out by buying a ticket that doesn’t cover all the zones they need, which differs from other tickets because they feel the onus of getting the zone correct is with the passenger, not the driver/vendor.
- Overall, flexibility emerged as a key factor for deciding on ticket purchase, and those that were deemed most value for money were those that met this need. However this is also balanced with overall cost; while bulk-buy tickets (such as monthlies or weeklies) are affordable for some, for others paying a lump sum up front is unaffordable.

3 Young people and ticketing

For young passengers, buses are the primary mode of transport and are heavily relied upon. A range of tickets were bought by young people in each area (see appendix). In areas without a youth scheme, younger passengers are forced to purchase an adult fare, which is frustrating and results in them feeling undervalued as passengers. There is therefore a strong requirement from young passengers to be recognised not as adults, but as young passengers.

“Why should we pay an adult fare when we are not adults, we are teenagers and should be recognised by bus operators as younger passengers.”

Bristol, 16-18 year olds, work/apprenticeships/education

College/university and friends are the main sources of information for youth scheme tickets, while the bus driver is heavily relied upon by those not participating in a scheme. Younger passengers’ awareness levels and ticket-purchasing routes varied depending on which area they lived. We spoke to passengers who used tickets as part of a youth scheme, and those who bought standard tickets.

Where youth schemes were available, younger passengers were made aware of these largely through their college or sixth form, although they would purchase either in the Post Office or on the bus itself. Younger passengers in Staffordshire also noticed adverts in the local paper for the Staffordshire card.

In the areas where youth schemes were available, the majority of young passengers were aware of these via friends, college or university. Passengers would ask friends and peers about bus information either via word of mouth or social networking sources such as Twitter and Facebook.

“If it is a new route I will BBM it, see if anyone knows the cost.”

Leeds, 16-18 year olds, work/apprenticeships/education

Passengers in Staffordshire had high awareness of the Staffordshire Card, even amongst older passengers who knew of younger friends/relatives who currently use it.

Younger passengers say that the discounted fare encourages them to use the bus regularly in Staffordshire and appreciate being recognised as a younger passenger. There were concerns as to how they will travel when they are no longer eligible for the card, with many suggesting they will search for cheaper alternatives such as walking, sharing lifts with friends or cycling.

“It is a necessity to use the bus to get around, so it really helps that we have the card and are getting that saving.”

Staffordshire, 16-18 year olds, NEETS

“I don’t know what I am going to do when I can no longer use the card, I will have to walk or catch a lift with people. I don’t think I would be able to afford to use the bus as much I do now.”

Staffordshire, 16-18 year olds, NEETS

Younger passengers without a scheme or initiative in their area purchase adult fares from the bus driver and rely on the driver as an information source; they expect the driver to offer the most economical ticket available. However they are not always reassured that they are getting the correct information from the bus driver, largely due to the limited time the driver has to provide them with comprehensive fare options as they board the bus.

There is an appetite among younger passengers for better display of fare options on the bus itself and/or direction towards more information, such as leaflets and websites, which would help to reassure and educate passengers on bus fares and ticket types available.

A few younger passengers had looked online to find ticket and timetable information. However, they were unable to find the information they required.

“I tried to look online for ticket fare and types but it was so confusing. I just asked my mates what they were getting in the end.”

Bristol, 16-18 year olds, work/apprenticeship/education

The price of tickets are felt by younger passengers to be too high, especially by those who are paying adult fares. Younger passengers feel undervalued and frustrated with the perceived unfairness that they have to pay for an adult fare despite being under 18 years old and often still in education.

Younger passengers often have limited access to other transport modes, so have no choice other than to use the bus and pay the set fare. There was a strong call for subsidised fares

amongst younger passengers which they felt would encourage them to use the bus more frequently.

3.1 Key issues for young passengers

Younger passengers identified three main problem areas that they felt should be addressed.

The lack of student offer in some counties, which makes travelling by bus for students less economically viable :

- all students feel they should be recognised by all bus operators via the offer of a subsidised ticket fare which is available to all, not just those in certain areas of the country or if they attend certain colleges or universities
- students are recognised and provided with reduced rates and prices in other industries such as retail and rail, such as NUS cards and Young Persons Rail Card which are used regularly by students, and they feel this should also be the case when using the bus.

“Bristol University have their own bus that takes them around town, I think all students should be able to have some sort of discount on travel regardless what university or college they attend.”

Bristol, 16-18 year olds, work/apprenticeships/education

Being identified as an adult at 15 years old and subsequently having to pay an adult fare is frustrating, especially as they are recognised as adults at 18 in other areas of their life such as the cinema and nightclubs:

- younger passengers are often still in education or early years of employment and therefore have a low income
- having to pay an adult fare makes younger passengers feel under-served as a result, especially taking into account their high frequency of travel and loyalty towards the bus which they feel should be rewarded and recognised by bus operators.

“When you’re 15 for everything else you are classed as a child, so it’s not fair that when you’re still at school you have to pay an adult fare.”

Manchester, 16-18 year olds, work/apprenticeships/education

Younger passengers also require flexibility in the tickets they purchase. Current tickets can restrict young people due to a lack of fares on offer that can be used across routes and operators:

- younger passengers suggested that bus operators should implement a multi-operator ticket that will allow them to have the reduced rate across different bus operators
- flexible options such as a flat rate or tickets that allow multiple stops were also felt to be appealing and fit into how young people live and use the bus, which is often unplanned with no predictable timetable/schedule.

“I would like to pay for a set number of journeys up front on a card and be rewarded by a reduced rate.”

Bristol, 16-18 year olds, work/apprenticeships/education

3.2 Possible and current youth initiatives

Young passengers were provided with some ideas on possible and current youth initiatives within the groups to gauge reactions and appeal.

It is key for younger passengers that initiatives focus on cost-saving opportunities and ensure they are as easy as possible to understand and calculate. The most popular initiatives provided these cost savings in a comprehensive way by offering a flat rate as opposed to having to calculate a percentage discount (i.e. the Staffordshire and North Yorkshire cards).

Barnsley Mi card

Available to those under 18 in Barnsley, allowing travel on buses within the borough for 30p per journey, all day, every day, including weekends. Mi Card can also be used as a library card and a South Yorkshire MegaTravel pass to access discounted travel on buses, trams and trains across South Yorkshire for 11-16s.

The low price of this ticket option was very appealing to all, and many would be pleased if this was available in their area. A minority also found the option to travel by tram and train at a discounted rate appealing, although not all are travelling by these modes currently.

Your Staffordshire card

The Your Staffordshire Card is available to 11-19 year olds living in a Staffordshire County Council area. This card covers travel by bus on any single journey starting/ending in Staffordshire County Council's area. It is £1 to travel between any two points, no matter how far the journey or how many changes of bus are required.

The electronic card is free and the discounted fare automatically applies to children under the age of 11.

North Yorkshire Ride around for £1

Available to those under 18 years, participating bus operators across Craven offer a flat £1 fare for travel anywhere in Craven for the day.

Younger passengers felt both these schemes were a welcome initiative, especially those who are currently paying adult fares, such as those in Bristol. This group of passengers also appreciate that this extends to those that are 19 years, as they are still likely to be in education at this age, or have a low income if they are working. In addition, the simplicity of a flat rate (versus a percentage discount) was valued and easy to comprehend.

Norfolk Green 20 per cent discount for 16-19s

This card offers a 20 per cent discount off the adult fare to those that are 16-19 years old (up to their 20th birthday) with no ID needed.

Younger passengers could not easily calculate the value of this discount and therefore found it difficult to evaluate how much they would be saving. Although they did appreciate that having a discount was a positive initiative, they would prefer a flat rate.

Citycard 360

The Citycard 360 card is free to everyone aged between 11 and 18 and offers discounted travel along with retail, leisure and library savings, which passengers can only apply at the Nottingham City Transport travel centre.

A card like the Citycard 360, which provides discounted travel for students and young people, was felt to be a good initiative for this group but passengers felt this would have to be monitored properly to avoid fare evasion.

Their ideal scheme

In addition to reduced bus fares, young passengers would welcome having further discounts in restaurants and shops. This would make passengers feel valued and recognised by bus operators for their contribution to travelling by bus on a regular basis. The appeal of this scheme depends on the retailers that would be featured, with fashion retailers being the most popular, as well as music/gig tickets.

A pre-loaded system (pay as you go, at a reduced flat rate) is felt to be a highly attractive initiative for this group that would fit into the way they live, as they tend to be more spontaneous and less likely to plan ahead. This would be a more convenient way to pay for bus fares, removing the need to think about paying each time, or carry correct change.

“We need an Oyster card system in Bristol. It would be so simple, all you do is top it up and swipe, it’s easy.”

Bristol, 16-18 year olds, commuter, work/apprenticeship/education

“I like the idea of some sort of ticket that you could preload on your phone or have with you; that would be an easier way to pay.”

Manchester, 16-18 year olds, commuter, work/apprenticeship/education

“I like the idea of having money off retail as well, like Topman. That would be good. You get that with an NUS card when you go uni.”

Leeds, 16-18 year olds, leisure, work/apprenticeship/education

Younger passengers can be hard to reach; however, they have identified three key places where they would like to find out about new initiatives.

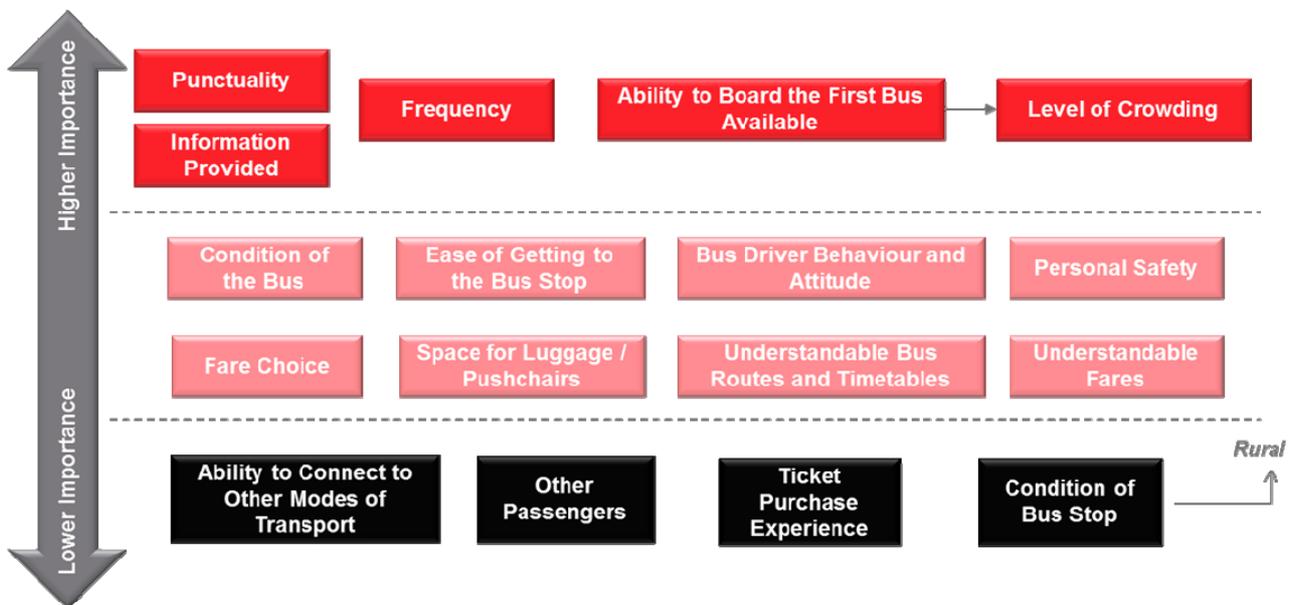
- College or school - young people often get other information at school/college (e.g. NUS card) and they consider it a trusted source. This also offers the opportunity to aid registration process if needed.
- Bus – publicising fares and ticket types on the buses themselves, either on posters or leaflets that can be picked up when travelling on the bus. A convenient and accessible place to distribute information about bus tickets and fares

- Online - a website where information on tickets, fares and timetables is available; one central website that incorporates multiple bus operators.

4 Perception of value for money on buses

On the whole, regardless of whether or not passengers have other modes of transport available, they feel they are getting value for money on buses when compared to other modes. Passengers generally compare bus costs to the cost of a car when calculating the value for money they receive on the bus. This comparison is also consistent even among those that do not own a car. Passengers judge value for money by balancing the price paid with the service received versus other modes of transport.

As the diagram below demonstrates, some service factors are more important than others when judging value for money. Punctuality, frequency, ability to board the first bus and information are perceived as some of the most important aspects of evaluating value for money.



We will now look at each of these elements in more detail, pulling out any area differences where relevant.

4.1 Punctuality

It is inconvenient for passengers when a bus does not arrive on time so this has a negative impact on value for money.

When a bus is late, passengers feel they are wasting time waiting and are frustrated that they will not arrive at their required destination at the expected time.

“Where I live there aren’t that many buses, so if it is late then it is really annoying because you don’t know when the next one will come.”

Bristol, 56-62 year olds, leisure

“I’m late for everything because of the bus...I’ve never known the ... bus to be on time, not once.”

Staffordshire, 16-18 year olds, NEETS

Most passengers understand that certain unforeseen factors such as heavy traffic and poor weather can impact upon punctuality. However, they feel that it is key that disruptions are communicated to avoid frustration and to allow passengers to plan their journeys more effectively.

“I need to get to work on time and it is very frustrating when the bus is late, especially when they don’t tell you why they are late.”

Leicester, 19-25 year olds, commuter, work/apprenticeship/education

As one would expect, for commuters, being late for work is a frustration as they rely on the service to get them to work on time. Late services can often have negative consequences from their employers. Similarly, being late for job interviews and college as a result of buses not arriving on time is a common frustration for younger passengers who rely heavily on buses.

“Obviously if you're late for work then you can get told off, but it was due to the bus.”

Leicester, 19-25 year olds, commuter, work/apprenticeship/education

“I have been late for job interviews because the bus has not arrived on time.”

Staffordshire, 16-18 year olds, NEETS

Passengers living in rural areas are more heavily affected by late-running services than those in urban areas. This is due to the lower frequency of buses in rural areas, meaning there are few alternatives and passengers can be left waiting for a very long time.

There is also a lack of information. Passengers highlighted concerns about safety whilst waiting a long time for a bus in more isolated areas. Within rural locations, it is even more important that buses run as scheduled (as much as not too early as too late) due to increased disruption if a service is missed.

“If you've only got a bus once an hour and it comes early, and you're not there because it's early, then you've got a bit of a problem. You've got to wait around for another hour.”

Leicester, 19-25 year olds, commuter, work/apprenticeship/education

4.2 Frequency

The frequency of the bus service is often linked to the punctuality of the buses. Both frequency and punctuality affect the ability of passengers to arrive at their destination on time and therefore are highly important to passengers.

“My granddaughter had to move schools [because of infrequent buses]. She would had to have got there for 7:30 or it would have been 9:30.”

Staffordshire, 56-62 year olds, commuter

The frequency of buses also affects passengers' feelings about the efficiency of the bus service. In other words the operator has allocated the correct number of buses to be in service at any given time.

There are perceptions among passengers that more buses should be allocated during rush hour as this is the time when more people are using the bus. Passengers feel that this does not always occur and it causes frustration if passengers cannot board the bus if it is full. A more frequent bus service means passengers feel they are getting a well-run, reasonably-priced bus service.

Rural areas tend to perform poorly in providing a frequent bus service. Most passengers understand the reasoning, for example, that some areas such as rural Staffordshire do not have a bus service running on a Sunday due to low numbers of residents living in that area. Younger passengers would prefer more frequent buses in rural areas at the weekend as this is the time when they want to socialise with friends.

The frequency of bus services in urban areas was perceived overall as sufficient and passengers were happy with the frequency of their bus service.

Commuters are sensitive to the frequency of buses as this can affect their ability to get to work on time and causes unnecessary time wasting. Although this is important to leisure passengers, as is the case with punctuality, frequency tends to be less of an issue due to the relaxed nature of their trips.

“You just waste a lot of time waiting for buses. My journey takes roughly an hour. If I were driving, it would take 45 minutes. You spend ten minutes at least waiting for buses to come, depending on how often they run.”

Leicester, 19-25 year olds, commuter, work/apprenticeship/education

4.3 Ability to board the first bus/level of crowding

Passengers expect to be able to board the first bus that arrives and this is important to them when travelling by bus:

- they don't want to wait for another bus, ultimately making their journey longer than necessary
- they expect that bus companies will be efficient and run a sufficient number of buses to cater for demand.

The passengers taking part in the research were unsatisfied when buses are crowded as this can make their journey uncomfortable, especially if the journey is long distance.

Although most passengers, especially commuters, would board a busy bus, this is not their preferred way to travel and they expect a seat for their fare.

“It is [important for value for money] but they don’t acknowledge it... if you pay for it you want to sit down, don’t you... if you get it at rush hour every day and you get on in the middle of a lot of people’s journeys and you are standing and you do it every time it begins to irritate people then.... If you had a 50 minute bus journey where you had to stand up you’d be pretty annoyed.”

Manchester, 26-35 year olds, commuter

On the whole, the passengers we spoke to felt that bus services are delivering well on capacity and passengers are generally able to board the first bus available. The level of space on buses is felt to be sufficient, especially in rural areas. However, some passengers in urban areas such as Bristol and Nottingham had experienced busy and crowded buses which they weren’t able to board. This resulted in them having to wait for the next bus and extending their journey time.

The level of crowding on buses has a different impact on passengers depending on their needs and the type of journey they are making on the bus.

- Some younger passengers and commuters reported crowded buses driving past them which can be frustrating and makes them late for college or work. This was particularly apparent in Bristol, where the bus services are heavily relied upon.
- When buses are too busy, older and leisure passengers are more likely to wait for another bus as they tend to be less time pressured. However, this is still an inconvenience as it extends overall journey time and is seen as an important element that bus companies should address.

4.4 Information provided

Passengers want as much information as possible in order to use the bus service most effectively and plan their journeys correctly.

“It’s good. If you’re at the stop and you want to go and buy a newspaper, and it says 4 minutes, you’re like ‘I’m going for it!’”

Manchester, 26-35 year olds, commuter

Passengers require more information about fares, routes, and real-time information either at bus stops or via an online central source.

In the areas where real-time information is provided this had a significant impact on the perception of value for money due to the quick, clear and accurate way it can communicate bus times:

- Enables passengers to plan their journey more effectively. They would also be less frustrated if they were informed of the exact time the bus was due to arrive.
- In addition, there is an opportunity to incorporate technology within the information system to enhance the perception of a more modern and efficient service.

“I don't think they're keeping up with the times as much as they should. It's better with the trains... you can see the trains are moving forward.”

Leeds, 36-55 year olds, leisure

Passengers living in cities are more likely to have real-time displays currently available at bus stops and passengers appreciate this information when waiting for the bus.

Passengers in rural areas feel this is less likely to be available, and indicate that bus stops tend to be basic and less sophisticated. This difference in service provision between urban and rural areas results in passengers in rural areas feeling under-served, especially as buses run less frequently.

Furthermore, passengers in rural areas have a greater likelihood of waiting for longer periods of time which adds to the feeling of inequality. The provision of real-time information would allow passengers to be able to plan their journeys effectively and alert employers if they are going to be late.

It is also important for leisure passengers, especially when travelling late at night, to ensure they can plan and use alternative modes of transport if needed. There is less tolerance for longer waiting times at night, especially among female passengers, due to increased fear for personal safety when travelling at this time.

Younger passengers spontaneously suggested ideas to improve access to information. Ideas include developing a bus mobile app and using social networking sites such as Twitter to keep them updated. These are familiar information sources that are used currently for other modes of transport such as the train.

“I use Twitter to see if the trains are running on time, I follow them and they are great at updating disruptions and time changes and stuff.”

Staffordshire, 16-18 year olds, NEETS

4.5 Condition of the bus

A clean and well-maintained bus provides a comfortable and pleasurable environment to travel in and passengers want buses that are well-maintained and cleaned regularly in order to attain this level of service.

“You've paid however much it was and you get on and you think ‘oh my god, I've paid to be on here and I don't even want to sit down in that chair’.”

Leicester, 26-35 year olds, leisure

For some passengers, there is a strong correlation between the standard of cleanliness of the bus and the likelihood of the bus being well maintained, which in effect also influenced their perception of personal safety. Passengers do however prioritise other bus service requirements such as punctuality, as this is felt to be more important than the internal condition of the bus. Ultimately, customers would prefer a clean and comfortable bus to

travel in, but if they have to prioritise they will travel on buses regardless of their cleanliness.

“You think if they don’t bother to clean [the buses], are they doing the brakes?!”

Staffordshire, 56-62 year olds, commuter

“I’d rather it be on time than absolutely spotless.”

Staffordshire, 16-18 year olds, NEETS

Passengers noted that buses on busy urban routes often attract more litter on the bus, especially during rush hour, while buses in rural areas tend to transport fewer passengers overall and therefore attract less litter.

Those that travel on buses occasionally, such as leisure passengers, tend to be more sensitive to the condition of the bus as they are less accustomed to an unclean bus. This sensitivity is less pronounced amongst more frequent users. Less frequent passengers are also more likely to compare buses with other modes of transport that they may use more often, such as taxi and car, which they perceive as providing a more pleasant travelling environment.

4.6 Personal safety

Passengers’ perception of personal safety is often linked to the behaviour and attitude of other passengers and this has an impact on whether they choose to travel by bus or use alternative modes of transport:

- some avoid travelling by bus late at night or travel in groups to increase overall sense of safety - conscious of other passengers that have been drinking and may be unruly
- most feel safe when travelling during the day as other passengers are mainly commuters.

The behaviour of the bus driver can also contribute to feeling safe, both in terms of driving performance but also his or her ability to deal with passengers who cause trouble.

Younger passengers are more likely than other ages to travel by bus at night as often they have no other transport options. So it is important that measures to increase the feeling of safety are in place for this group when travelling at night. Currently younger passengers tend to travel with friends and avoid travelling on their own at night. Similarly, female passengers are more conscious of their personal safety at night generally and are more likely to travel with peers (meeting friends on the bus) to feel safer.

Some leisure passengers only use the bus late at night, as this is a much cheaper alternative to taking a taxi, and are therefore more likely to encounter disruptive behaviour from fellow passengers. However, this group, with the exception of younger passengers, will consider other modes of transport, such as taxis, if they feel their personal safety may be at risk.

Older passengers are perhaps the most sensitive to other passengers' behaviour. However, this group is also more likely to comment on the role of the driver in terms of their perceptions of feeling safe - for example, driving too fast or not allowing adequate time for passengers to sit down before accelerating. So they directly link the drivers' behaviour to the level of personal safety they feel while travelling.

“I haven't felt that unsafe on a bus, but I don't use them at night. And I wouldn't use them at night....I think there are some bus routes I wouldn't use [at nights] because of the areas they go through.”

Staffordshire, 56-62 year olds, commuter

4.7 Ease of getting to bus stop

Getting to a bus stop easily is relatively important for passengers, as it contributes to their overall journey time, which can impact on their decision regarding which mode of transport to use (if more than one is available).

For urban passengers, getting to a bus stop presents few problems as they generally have a number of stops close by. For those living in more rural areas with fewer bus stops, travelling by bus can feel less convenient. This results in some having to include extra planning in order to reach the bus stop itself, which can be off-putting.

Having access to a bus stop is more important for younger passengers as this is most likely to be their primary mode of transport. In some cases younger passengers that are living in rural areas have to rely on others to drive them to a bus stop, making the journey time longer and less convenient as a result.

Leisure passengers are more likely to be tempted to switch to travelling by car or taxi if inconvenienced by having to travel too far to get to the bus stop. Older passengers cite the need for bus stops to be close to where they live, as well as conveniently located in town centres (close to the shops and amenities).

“If you've got to walk a long way to get a bus you think 'oh I'll just get a taxi.’”

Leicester, 26-35 year olds, leisure

4.8 Clarity of bus routes and timetables

On the whole, passengers that use the bus more regularly were able to understand current route and timetable information at bus stops. They also rely on friends, relatives and colleagues for information. However, the main concern for passengers is not knowing where they can source travel information and obtain up-to-date accurate bus route information and timetables for their area.

The need for clear information about bus routes and timetables is particularly important for those that do not use the bus on a regular basis and are less likely to be familiar with routes. There is an expectation that this information would be available online and at bus stops. Some passengers have attempted, unsuccessfully, to search for this information online. The often basic functionality and lack of clarity of bus websites has meant that the

required information was not found. Those living in rural areas are also more in need of this information due having a less-frequent bus service running in their area.

Younger passengers particularly expect to find information online. They are more technologically literate and rely on the internet as an information source in other areas of their lives.

“I don’t actually think there is one website that you can go on [where] everything is there, it’s just bus timetables.”

Leicester, 19-25 year olds, commuter, work/apprenticeship/education:

4.9 Bus driver behaviour and attitude

The bus driver is often the first person passengers see in the morning (especially commuters), so their interaction with the driver can impact on the mood in which they start their day. The bus driver can have an effect on the experience the passenger has while travelling on the bus, with the attitude and behaviour of the driver impacting on how enjoyable a journey can be for passengers. All acknowledge that chatting to passengers is not part of the driver's job and that he/she has a number of other roles to fulfil.

“You are paying a lot for the bus; it is not hard to just be normal and give a smile, rather than just grunting.”

Bristol, 16-18 year olds commuter, work/apprenticeships/education

“It is annoying to get a miserable driver but I just accept it, I can live with it, I have forgotten it by the time I have sat down.”

Leeds, 16-18 year olds, leisure, work/apprenticeship/education

The driver is also the main contact and information point for many passengers while on the bus, so passengers rely on them to be approachable and knowledgeable regarding tickets and routes to ensure they purchase the correct (and cheapest) ticket for their journey.

“My bus driver doesn't say that you can save money on this, that, and the other. They're not that helpful when it comes to value of tickets.”

Leeds, 36-55 year olds, leisure

The driver's performance at the wheel also impacts on perceptions of personal safety; passengers expect a driver who drives smoothly, with care and attention, and makes them feel safe in terms of his/her attitude to other road users. They also expect the bus driver to be considerate to passengers when driving, that is to wait for passengers to sit down before pulling away to prevent them lurching onto the floor or seat.

Similarly, whether the bus driver stops for passengers, or keeps the doors open for them when they are running for the bus, can make the difference between getting to work on time or being late.

Passengers also described how the bus driver adds an element of security as they are visible to passengers and can intervene when other passengers are not behaving properly. This is valued by passengers.

Those living in rural locations often had a more personal relationship with their bus drivers and interacted with them on a regular basis, with some drivers knowing their passengers' names and there were some cases of drivers stopping and picking up passengers even if they hadn't yet reached the bus stop. This friendly nature of drivers makes passengers feel valued and well treated by bus companies, which results in an increased willingness to travel by bus versus other modes.

“If he can see me near the bus stop, he will stop and pick me up, he’s really good like that.”

Staffordshire, 56-62 year olds, commuter

Younger passengers however feel that they are treated in a less friendly manner and with less respect than other passengers, particularly older passengers, despite being regular users of the service (although they do recognise that drivers have a lot to do). This is frustrating to younger passengers and can have a direct effect on how they feel about travelling by bus.

“It can ruin a good day, it can put you on a bit of a downer [if the driver is rude].”

Leeds, 16-18 year olds, leisure, work/apprenticeship/education

“Because bus drivers normally are really moody, to have that bus driver who was really friendly, it was just a real shock... It’s just better customer service isn’t it, making you feel like you’re valued.”

Leicester 19-25 year olds work/apprenticeship/education

“It really annoys me that the driver is always so nice to older people, but not to us. He normally just grunts at me, but is really cheerful and friendly and that to the old ladies.”

Staffordshire, 16-18 year olds, NEETS

4.10 Space for luggage and pushchairs

Overall, space for luggage and pushchairs is deemed of low importance amongst the majority of the sample we spoke to, as the need to take a pushchair or luggage on a bus occurs quite infrequently. Those who have access to a car generally opt to travel by car with their children as this offers higher levels of comfort and practicality.

However, an area for these items is certainly felt to be a ‘nice to have’, especially space for shopping bags as this prevents the discomfort of carrying them or taking up foot space under the seats. In addition, it can be awkward to fold down buggies (especially when the bus is moving), so an area where they can be left up, with the child still in, is valued. Bus

companies do however currently restrict the number of pushchairs allowed on at one time which can be frustrating for passengers.

For mothers that travel with a pushchair, this is a more important factor, especially those that have no other mode of transport available to them.

“I wouldn’t go on a bus with a pushchair. My son, he’s four now and at school... There were a couple of times the bus driver said no because you’re only allowed, supposedly only allowed, two...unless you folded it down which was a pain.”

Manchester, 26-35 year olds, commuter

“It used to affect me when I was younger I’ll admit. Because if someone was on with a pushchair already, you’d have to wait for the next one.”

Leicester, 26-35year olds, leisure

Space for luggage is less important as this need occurs infrequently and is generally only an issue when the bus is busy.

4.11 Fare choice and understandable fares

A choice of fares is important to passengers as it reassures them that they are receiving a flexible offer that will meet their travel needs and provide them with the cheapest way to travel.

However, this should be balanced with understandable fares; if the fare choice is not understood or provides too many options, passengers can become confused which results in a lack in confidence that they are purchasing the cheapest ticket available.

“It makes you feel like you’ve got more value if you’ve got options to choose from.”

Leicester, 26-35 year olds, leisure

Many were unaware of the different fare options in their area and felt fare choices are poorly communicated, perceiving there to be:

- no centralised source for researching fares; there are separate websites for each operator and fares are not displayed at bus stops or on buses
- no resource for advice on the best ticket to meet passengers’ needs (apart from the driver).

“It’s not fair at the minute, it’s not advertised.”

Leeds, 36-55 year olds, leisure

4.12 Condition of the bus stop

The condition of the bus stop has a lower impact on perceptions of value for money as a limited amount of time is spent there. However, a need for better provision of information at this point was identified. Passengers expect to have information on bus times and routes

available at bus stops, either via real-time information screens or communication on the bus stands themselves.

A number of requirements surrounding bus stop facilities emerged:

- a place for passengers to sit if they have a long wait
- a shelter/structure to help passengers feel more secure and less exposed whilst waiting
- basic maintenance is appreciated to help passengers feel comfortable. For example replacing and clearing smashed glass. Some mentioned ensuring that bus stops are 'vandal proof' to help prevent them becoming unsightly/less comfortable.

“It just helps if there’s a shelter there, because obviously if it’s raining and you’re waiting for a bus...”

Leicester, 19-25 year olds, commuter

“They (bus stops) are more intimidating than train stations as they tend to be lonelier places.”

Staffordshire, 56-62 year olds, commuter

A digital display facility was also mentioned as a way to enhance the condition of bus stops and is a key element in driving perceptions of value for money.

The importance of the condition of the bus stop increases in more rural areas as passengers may be waiting for the bus for longer and can feel more exposed/remote, so a shelter and weatherproofing becomes more important to them.

4.13 Ticket purchase experience

Buying the ticket is a short transaction that generally has limited impact on perceptions of value for money, unless passengers are required to pay more for their ticket than expected. Most purchase their ticket from the driver as they board the bus, so the experience itself can be driven by the bus driver’s behaviour and attitude.

Passengers become frustrated when the driver is unable to provide them with the correct change. There were instances in Leeds and Bristol where passengers were given their change in the form of an IOU ticket to be reimbursed at a later date, which made passengers feel undervalued and out of pocket as a result.

The inability to provide the correct change is regarded by passengers as unprofessional and disorganised. Passengers expect the bus driver to have sufficient funds to provide change. Similarly, passengers also find the need to have the correct change to purchase their ticket stressful and this can make travelling by bus seem less convenient as a result.

“I think it’s disgusting if they can’t set it up so they give you the proper change.”

Leeds, 36-55 year olds, leisure

“You don’t always know how much the bus is going to be either, so you can’t have the correct change all the time.”

Leicester, 19-25 year olds, work/apprenticeships/education

“First buses have said that they won’t give change out...One of them said that he couldn’t give me change because he had none. If it were 50p I wouldn’t have been bothered, but he said in future you’ve got to have the correct change or they can refuse you...Stagecoach are fine with it.”

Manchester, 16-18 year olds, commuter, work/apprenticeships/education

Younger passengers mentioned issues regarding drivers not accepting their college discount pass and then failing to advise them on the cheapest ticket for their journey which left them feeling disgruntled and let down.

An easier/quicker method of payment, such as a pre-loaded swipe card, was suggested to help speed up boarding and thus help buses run to schedule.

4.14 Other passengers

Other passengers are not felt to be a factor that bus operators can control, so have a low impact on value-for-money perceptions. However, they can impact on levels of comfort when travelling and, as a result, general mood:

- loud music on digital music players was a key complaint – can be distracting if trying to read or talk to travel companions
- poor personal hygiene of other passengers can also be uncomfortable
- young people/teens swearing is an issue for passengers older than 19.

“Other passengers affect your mood greatly – they affect whether you come home happy or not.”

Nottingham, 36-55 year olds, commuter

The poor behaviour of other passengers can also prevent bus use at certain times of the day and/or on certain routes due to impact on perceptions of personal safety; this particularly so for female passengers.

The impact of other passengers differed across the sample:

- Women tended not to use the bus alone at night as they can feel intimidated by other passengers – this affects their perceptions of personal safety.
- Leisure passengers are more likely to complain about the behaviour of other passengers at night, usually a result of other passengers being drunk. However, there were some mentions of this behaviour from older passengers by teens travelling during the day.
- Other passengers are felt to be less of an issue in the morning as they tend to be people passengers see every day, all of whom are travelling to work and are likely to be better behaved.

4.15 Ability to connect to transport

The ability to connect to other modes of transport was rated as less influential on perceptions of value for money as most can complete their regular journeys entirely by bus. Of all transport types, a connection to a train station was felt to be the most important as this allows for longer-distance travel. Staffordshire passengers were the most vocal about a lack of bus connections to the train station.

“I think most of the time if I'm getting the bus, I'm getting the bus to do one journey, I don't need to get it to catch a train.”

Leicester, 36-55 year olds, commuter, leisure

“There aren't any buses going to train station I don't think, so it is difficult to get to a train station if you don't live near them.”

Staffordshire, 16-18 year olds, NEETS

4.16 Wheelchair access

Wheelchair access was felt to be very important to those who need it and is a service that bus operators have a responsibility to provide in order to promote equality. This, however, had low personal relevance for this sample, which did not include disabled passengers (so wheelchair access is not shown in the table).

Passengers do report feeling positively towards drivers who help those in wheelchairs; however the perception exists that buses are not that well-equipped for wheelchair users on the whole, due to a lack of space.

“My auntie is in a wheelchair and she can't get on buses. She can get on but not off, there's not enough space.”

Manchester, 26-35 year olds, commuter

5 Future initiatives

In addition to the initiatives for young people, all passengers were asked to think about existing and possible future initiatives which could improve the value for money of their journey. A number of ideas for future initiatives were tested in the research.

5.1 Line map

A line map was shown to respondents, similar to the ones used on the London underground, as an example of how bus routes and fares could be communicated to them in the future.

This was felt to be useful to help passengers not only plan their route before/during travel but also clearly understand how much they would need to pay for each journey. Some caution is required to ensure this is easy to read as there is a potential for passengers to be overwhelmed by too much information.

“This would be good if it had all bus operators so you can plan ahead and have one place with all this information.”

Staffordshire, 56-62 year olds, commuter

5.2 A flat rate

A flat-rate payment system for those travelling to education/work, allowing multiple trips and longer distances.

This initiative was well received as it was felt to be an easy and cost-effective way to travel, especially when travelling longer distances. Also, this idea has the potential to make passengers feel rewarded for being frequent users due to the cost saving.

5.3 Set number of journeys

A ticket for a set number of journeys; being able to buy eight journeys instead of a week or day rider (or better advertising of these schemes where they exist).

This idea was most appealing to leisure passengers who only use the bus occasionally. However, it would be important for the set of tickets to be valid for a long period of time to ensure they do not expire - they need to be valid for more than one month. Some leisure passengers were concerned that this might be confusing and they would lose track of how many journeys they had made. In addition better communication of this ticketing option, where it exists, is required, as many were unaware and educated only by others in the sessions and/or stimulus presented.

“This would be good if you know you will use this in the allocated time given. I would use this because I only use the bus now and again.”

Bristol, 56-62 year olds, leisure

5.5 Group ticket

A group ticket for three or four people who receive a small discount.

This option was appealing to those with families and younger passengers who are often travelling with friends on the bus. For the majority, this held lower appeal as they travel in groups infrequently and there were some concerns that there is little flexibility if one person needs to travel separately on either journey leg.

“If you are going out shopping with mates, this is really good and will be a cheaper way to travel.”

Staffordshire, 16-18 year olds, NEETS

5.6 Bus for jobs scheme

Leading bus operators (Arriva, Blackpool Transport, Cardiff Bus, First, Go-Ahead, Ipswich Buses, Kinchbus, National Express, Network Warrington, Newport Bus, Stagecoach and Trent Barton) were offering free travel to unemployed people on many of their bus services in England, Scotland and Wales for one month valid from the 1 to 31 January 2013. You had to be over 18 and have been looking for work for between three to 12 months.

This idea was the most polarising initiative, with some concern that this type of initiative is open to ‘abuse’, such as free travel for leisure activities, while others think it is a positive step for unemployed people who need help to get themselves back into work.

“I don’t think they would use these for going to job interviews, so I think it needs to be monitored properly.”

Bristol, 56-62 year olds, leisure

“My daughter is on the dole and this would make it a lot easier for her to get to job interviews. I say to her there are jobs in town, but she often says to me ‘mum I can’t afford the bus journey to town to go to interviews’, so this would really help.”

Staffordshire, 56-62 year olds, commuter

6 Passenger suggestions

Respondents were asked to suggest improvements for fares and information provided for bus travel. Three key themes/needs emerged.

Electronic loyalty card

Passengers felt that an electronic payment system, similar to London's Oyster card, would heighten convenience and speed of payment and avoid the need for correct change. The discounted rate would also help passengers feel rewarded. There was no indication that a zonal method of ticketing would be appealing however.

Synchronised information sources

A strong need for all information sources to be easily accessible, clear and succinct was identified by passengers. Suggestions included:

- a universal website for all local areas and bus operators, including features such as a TfL style Journey Planner and Google Maps
- leaflets (including full timetables and ticket options) available on all buses
- clear and up-to-date line maps clearly displayed at all bus stops.

Reliable real-time information

Real-time information at bus stops for all urban and rural routes would help passengers plan their journey and manage the expectations of passengers and they people waiting for them at the end of their journeys, such as employers. In addition, a free app with this information would help journey planning before starting their journey and whilst on the go.

7 Conclusions

Overall, the bus was felt to be value for money compared to other forms of transport. However, there is a need for clearer ticketing structures and service improvements.

Overall, passengers feel they are getting value for money from buses to some extent:

- cheaper than carrying out the same journey by car
- easily accessible compared to train stations and tram stops
- bus lanes can make journeys faster/more efficient during heavy traffic
- more relaxed (not having to drive, so less stressful).

Key factors when considering value for money on buses were:

- punctuality – especially for commuters for whom being on time for work or college is key
- bus frequency – can affect perceptions of ease of use and comfort as low frequency during busy times can lead to overcrowding
- ability to board the first bus available is important and although not ideal, commuters are likely to put up with crowding at busy times – it is key to ensure punctuality and prevent the feeling of time wasting
- the provision of information – ensures passengers' expectations are managed and helps prevent frustration as it allows them to feel they are making informed travel decisions.

Little planning goes into travelling by bus due to a lack of an easy to use, central resource – this creates a situation where there is limited awareness of different fare types and much reliance on the bus driver to ensure passengers are purchasing the best ticket for their journey. In addition, once fare choice was revealed in the groups, there was much confusion due to the large array of ticket types available and unclear language used.

There was a feeling amongst young people that fares can be expensive, especially in areas that do not provide a student or young persons offer/scheme:

- There is a lack of consistency around when young people pay an adult fare between areas. While 15 is felt to be too young to be paying an adult fare as they are still in education and income is low, 18 feels like a more appropriate age to be paying an adult fare.
- Ticket flexibility is key for this group, as it reflects their lifestyles and bus travel needs. Young people tend not to plan their day in advance and will spontaneously carry out activities such as visiting friends, which often involves them making multiple journeys on the bus. Therefore flexibility in ticket types is a welcomed option that will cater to young people's needs and frequency of bus use. It is important for youth schemes to offer either a flat or a discounted rate that is easy to calculate to ensure young people understand their fare.

8 Recommendations

Five key areas for improvement emerged from the research that may help enhance the passenger experience and ultimately positively impact on perceptions of value for money.

Central information source

There is a need to have a central, amalgamated information source where passengers can find out more about fares, ticket types and bus route information across different bus operators. Passengers mention National Rail Enquiries and Trainline as good examples and they feel that such services do not currently exist for bus services.

Such a resource would provide passengers with the necessary tools and knowledge to make accurate decisions regarding their bus travel, reassuring passengers that they have made the right travel choices. Furthermore, having this information in one centralised location will make this more accessible to users.

Having this information available as one easily accessible online source would make planning and researching journeys easier and more efficient, resulting in passengers being better informed. All the bus operators would need to be included so that passengers can compare and contrast route information and fares. This website's existence would need to be publicised widely on buses, in local libraries, bus stops, schools, colleges and local amenities, such as leisure centres.

However, there remains a need for information to be available via more traditional methods such as leaflets and at bus stops to ensure that those without access to computers are not alienated.

Clearer ticketing structure

Clearer ticketing structures within and across counties would help aid passenger understanding about the best fare for their journey. There is also a need to provide multi-operator/standardised fares across bus operators to prevent any feeling of unfairness based on differing ticket prices.

Electronic payment card

Having an electronic pay-as-you-go card system (similar to the Oyster card system in London) was a popular idea across the sample. This would allow passengers to top up in a host of convenient locations, such as newsagents:

- an easier way to pay for travel, reducing the hassle and time of paying for a ticket when boarding the bus
- eliminates the concerns around having to have the correct change when boarding the bus.
- the majority of passengers also think this system would make fares automatically cheaper.

In addition, a flat rate or reduced fee for those using the card would be welcomed, rewarding passengers for using the card and their frequency of travel.

Real-time information

Although some cities already provide real-time information at bus stops, there is a strong desire to have this rolled out across all areas and bus stops to reduce frustration when waiting for buses (linked to issues with punctuality) and to make planning journeys easier. Some suggested that route and bus-position information in particular could be available as an app, to make obtaining this information more convenient and user friendly (particularly for younger passengers). This would provide a chance for passengers to be informed before making their journey and while waiting at the bus stop.

Standardised age of 18 for adult fare

There is a need to raise and standardise the age at which younger passengers pay the adult fare so that it is fair across the country. Younger passengers feel 18 is a more acceptable age to pay adult fares, given young people have finished school at this age and are recognised as adults in other areas of life.

Appendix

Discussion Guide

Introduction – (5 mins)

- Welcome and explanation of the format of the session, MRS code etc., audio recording
- Honest opinions/ no right or wrong answers/ every view equal/ not everyone needs to agree
- Moderator to briefly explain purpose of the session – to gain information regarding their bus journeys and in particular bus ticket fares and value for money
- Respondents to get in pairs and introduce themselves to each other telling them a little about them, their hobbies, age, who they live with, how often they get the bus and for what purpose. Each respondent to then introduce each other to the group.

Travelling general (5 mins)

- What modes of transport do they have access to? E.g. car, bus, train, tram etc
- What mode of transport do they use most often?
- What determines this? Time of day, journey purpose who they are with, cost, distance, speed etc
- Do they use different modes of transport for different occasions? Why? Which ones? What factors determine this?
- How do they decide which mode of transport to use?
- What factors do they consider? i.e. weather, cost, time, location
- How does this differ for leisure versus commuting
- Has this changed at all over time? Why? In what way?
- What is their preferred mode of public transport? Why? Explore
- What mode of public transport do they least prefer? Why?

Traveling by bus context (10 mins)

- What comes to mind when they think about traveling by bus? How do they feel about travelling by bus?
- *Moderator to present 2 x A3 pictures of a green and red bus and moderator to write answers on post-it notes and stick on the corresponding buses (green positive comments and red negative comments) – respondents to be encouraged to also write any words that come to mind on post-it notes themselves – encourage both tangible and emotional responses*
 - What are the best/worst parts of traveling by bus?
 - To help, ask them to also think about the advantages/disadvantages versus other modes of transport
 - Does their response depend on what route they take? I.e. is their experience different on different routes? In what way?
- How often do they travel by bus?
- Who are they traveling with? Friends, children etc.
- Which occasions are they using the bus for?
 - What times of the day do they travel by bus?
- What factors determine if they travel by bus or not? Prompt with:

- cost
- journey time/distance
- information on times or fares
- frequency of buses in local area – meet their needs? Why/why not
- timings of bus in local area (i.e. late/early running, running at weekends)
- having to change buses
- people they are travelling with etc?
- How does this differ for leisure versus commuting.

Fares/tickets explored (20 mins)

- How much do they spend on bus fares on average per week? (rough figure)
- To what extent does the cost of bus fares impact on their ability and desire/likelihood to travel by bus-by commuting/leisure
- What bus ticket do they usually get?
- How does this differ by journey type and why.

Show and tell

Choose 3-4 respondents to talk through the tickets that they have bought in, telling the moderator about the following:

- What type of ticket is it
- Where were they going – describe the journey
- What preparation/ research did they do before purchasing the ticket
- What were their ticket/fare options available
- How much did it cost
- How flexible is their ticket? Do they know what it entitles them to-Does it give them the flexibility they require-ie can they travel any time, are they able to use more than one operator
- To what extent do they feel their ticket was value for money – why/why not?
- How much planning & preparation usually goes into the process of buying a ticket?
- What information sources are used to buy tickets? Which do you trust most/least? Why?
 - How did they find out about these sources?
 - How easy it was to obtain information about tickets
- How much planning goes into selection of ticket type? What is their thought process?
- Do they look at the different tickets types
- Which channels do they use to purchase tickets (online/on the bus/TVM/other)
 - What are the strengths and weaknesses of each? Is there anything that causes concern or difficulty when buying a ticket through a specific channel?
 - Which do they trust most? Why?
- How do you know you are making the correct decisions and have bought the ticket best suited to your needs? How confident are you about this?

Ticket and fare understanding

- What are the different ticket types available for journeys typically made?
 - What are the names of different ticket types available
 - How easy or difficult is it to understand differences in ticket types?
 - Do they have zonal fares in their area – awareness check

- Do they have multi-operator tickets in their area - awareness check.

Moderator to present the current ticket offer available in their area - single, return, open day travel, multi-journey ticket, season tickets.

Moderator to go through each ticket type according to each area. Ticket types to be printed out on and distributed amongst the group.

- What are the benefits/disadvantages of the choice available? How could it be improved?
- Do they find this too confusing/complex in any way? If so, how would they improve it
- Are they aware of restrictions that may apply on tickets and where would they look to find this information?
 - Are they aware of when Off-Peak begin/end?
- What do they think of a zonal method of ticketing?
 - How would they envisage these would work (moderator to provide a description if struggling: i.e. their area would be divided up into a number of zones and travellers would be charged a fixed rate for travelling within each zone – the more zones they travel across the higher the fare) – client to amend/approve definition
 - How appealing would this be – why/why not
- What do they think about multi-operator tickets? Likes/dislikes
 - Does this mean they have to pay more for their ticket? How do they feel about this?

Value for money (25-30 mins)

- To what extent do they feel they get value for money when travelling by bus? In what way?
- How do they define value for money in the context of bus travel? How do they measure it?
 - The cost for the distance travelled
 - The cost of the bus versus other modes of transport
 - The fare in comparison to the cost of everyday items
 - Comfort/journey quality for the fare paid
- Do they compare bus fares with taxi fares for short journeys e.g. there is two of us its worth getting a taxi rather than buying two bus tickets
- What factors impact positively/negatively on their perceptions of value of money
 - Spontaneous reactions.

Moderator to present the following points on showcards and ask them to put them on a dart board - placing the **most influential in the middle** and those **secondary/less important on the outside**. Respondents to add any additional elements/spontaneous mentions on post-its. Moderator to explore the points in full and explore **why they have been placed in their respective position and how their bus service performs on each**.

(Moderator to note how reactions differ by frequency of bus travel, bus operator etc.)

- Ticket purchase experience – does perception of VFM differ based on where and how they purchase their ticket
 - Ease of understanding fares – how easy are fares in their area to understand (briefly as covered already)
 - Other passengers-anti social behaviour, noise, older people versus younger people etc
 - Fare choice – what do they think of the fare choice (briefly as covered already)
 - Personal safety – how safe do they feel on buses in their area, and also at the bus stop
 - Condition of bus – what do they think of the condition of their buses – inside & out, probe on smell
 - Condition of bus stop – as above
 - Driver behaviour & attitude
 - Punctuality
 - Ability to board first bus that arrives
 - Level of crowding on a bus
 - Ease of getting to a bus stop – how close is it does this differ for those in rural versus more built up areas
 - Ability to connect with other modes of transport (e.g. train, tram etc.)
 - Space for luggage & pushchairs
 - Wheelchair accessibility
 - Information provided e.g. real time at bus stops, available on mobile apps, position information (visual/audible)
 - Understandable bus routes & timetables
 - Bus driver (providing information/a human face/reassurance)
- In summary, which do they place as most influential in determining perceptions of value for money (i.e. in the inner circle) and which do they feel are secondary & why? Explore as positioning each element
 - Are there any elements that are not at all important/influential on perceptions of VFM
 - How does their positioning differ based on: journey length-give examples, journey purpose-give examples – i.e. do they have different needs
 - Do they feel their perception of value for money differs based on time of day they travel-do they have a choice?
 - To what extent do they get better value for money on some bus operators than others – which ones and why
 - To what extent do they feel some tickets/fares offer better value for money than others – which tickets offer better/worse VFM and why

- What other travel options do they have available to them?
 - How does bus travel perform on VFM against these other modes of transport
 - Moderator to note any differences in VFM perceptions based on alternatives available
- Have they heard anything in the media about bus companies/bus fares
 - How has this influenced their perceptions of value for money?
- Has cost of bus fares affected their ability to travel at all? In what way?
- Has the cost of traveling by bus changed over time? Why do they think this is the case?

Future initiatives (15 mins)

Moderator to explain that there are some current and possible initiatives that they would like to get some feedback on (Show cards).

- For those travelling to education/work have flat fares allowing multiple trips and longer distances
- Line maps (like the ones used on the London underground) to give a better idea where buses go, could also include price listings
- A ticket for a set number of journeys, being able to buy 8 journeys instead of a week or day rider (or better availability of these schemes where they exist)
- Group tickets, being able to buy a ticket for 3 or 4 people
- Bus for Jobs Scheme: leading bus operators (Arriva, Blackpool Transport, Cardiff Bus, First, Go-Ahead, Ipswich Buses, Kinchbus, National Express, Network Warrington, Newport Bus, Stagecoach and Trent Barton) are offering FREE travel to unemployed people on many of their bus services in England, Scotland and Wales for one month – from 1st to 31st January 2013. You have to be over 18 and be looking for work for the last three months to a year to apply
- Group to rank them in order of preference and appeal and explain why?
- What impact would any of these have on their perception of VFM? Why?
- How do these compare to what other modes of transport they use such as rail, tram, plane, taxi companies
- For groups under 25 years old
- City Card 360: The Citycard 360 card is free to everyone aged between 11 and 18 and offers discounted travel along with retail, leisure and library savings. You can only apply for a Citycard 360 at the NCT travel centre.

Moderator to explain that there are also a number of schemes that exist for young people – provide hand outs and talk through each: Moderator to check recruitment questionnaire before session and identify any schemes mentioned. Moderator to read out relevant schemes for each particular area

Sum up (10 mins)

- Group to be split into two and asked to imagine if they were in charge of running buses and improve their perception of value for money on bus services, what would they implement?
- Respondents to refer back to Bus, Person diagram and dart board, they created earlier and to bare these in mind
- Think about new/current initiatives described and build any elements from these into their approach
- Report back to the rest of the group - how could the current system be improved? What would be the most acceptable/fairest way to set fares in future?
- Thank and close.

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