

Bus passengers' trust and priorities for improvement

Prepared by Populus for Transport Focus

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Populus conducts research in accordance with the Market Research Society's code of conduct and is proud to be a founding member of the British Polling Council.

Contents

- Background and sampling
- Bus users/non-users profile
- Experience of using buses
- Attitudes and drivers of trust
- Passenger priorities for improvement
- Bus users versus non-users: attitudes to bus travel
- Summary of findings
- Appendix

Background

Objective

The main objective of this research is to measure **bus passenger's priorities for improvement and trust in local bus services**

Approach

REPRESENTATIVE POPULATION SAMPLE



The survey was conducted **online** with fieldwork between 7th - 27th October

The main sample design is based on a n=6000 **representative adult 16+ population** sample of England. Quotas were set by age within gender, social grade and government office region at the population level to ensure a representative design. The total sample included **bus users** and **non-bus users**.

The average interview took **20 minutes** to complete for bus users and five minutes for non-bus users who went through a shorter interview.

The overall sample includes additional **bus user boosts** for each of the seven PTEs (Bristol area treated as a PTE) to ensure a robust sample of PTE bus users. These boosts have been weighted back into the main population sample at the correct proportions and profile.

A separate boost was conducted for the London area wholly paid for by London Travel Watch. Those responses are **excluded** from this report.

This report is based on a total of 7,046 responses: 4664 bus 'users'; and 2385 'non-users' in England outside of London.

PTE BOOST
(Passenger Transport Executive)

Summary of key findings

Summary of key findings

1 **41 per cent of bus passengers have high trust in their bus companies. 6 per cent have ‘little’ or ‘no trust at all’**

Similar to Transport Focus’s results for rail companies. The younger age group have less trust in bus services, and there is some variation across areas and bus companies.

Two thirds of what drives trust comes from ‘delivering the essentials’ (reliability & value for money) and ‘corporate values’ (professionally managed, caring about place in community, seeming good employers).

When set against satisfaction scores, providing value for money, caring about what passengers think, and place within local community are strong drivers of trust but where the industry performs less strongly.

2 **Top priorities for improvement focus on value, keeping to time and scheduling**

Better value for money is the highest priority for improvement (PFI); understandably less for those travelling predominantly on free passes. Punctuality at bus stop, and journeys on the bus running to time are second and third respectively.

Increased reach and frequency of the bus network are 4th and 6th PFI. Making better efforts to tackle any anti-social behaviour is 5th PFI; higher for younger passengers and/or those having a disability.

For those who distrust their bus company, their PFIs are more focused on ‘delivering the essentials’.

3 **54 per cent of users and 28 per cent on non-users are open minded to make more journeys by bus**

Among users, those ‘open-minded to use buses more’ have double ‘high trust’ levels in their bus companies compared those not open-minded (56 per cent versus 24 per cent).

Among non-users, biggest reasons for non-use are reach & frequency of buses. But among the quarter open-minded to using buses more, on-bus experiences are more highly stated secondary reasons.

Users and non-users differ little by age, gender, and social grade; main difference is having access to a car (83 per cent versus 48 per cent). The sentiment of ‘buses are not for people like me’ is limited.

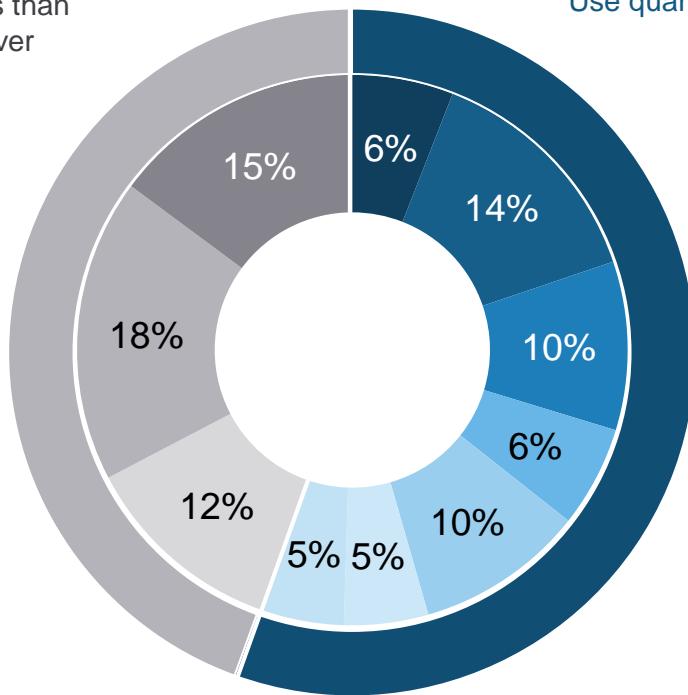
Bus users versus non-users: profile

Over half of the population are bus users, with nearly one in three using at least weekly

Bus usage: all respondents representative

Non-user: 44%

Use buses less than quarterly or never



Bus user: 56%

Use quarterly or more frequently

Daily

A few times a week

About once a week

About once a fortnight

About once a month

About once every 2 months

About once every 3 months

Every 4 months and a year

Less than once a year

Weekly

Monthly

Once every
few months

Less frequently

Profile of users across England outside London

Overall population representative sample n= 7,081

44% non-users: use less often than quarterly n= 2,382

56% bus users:

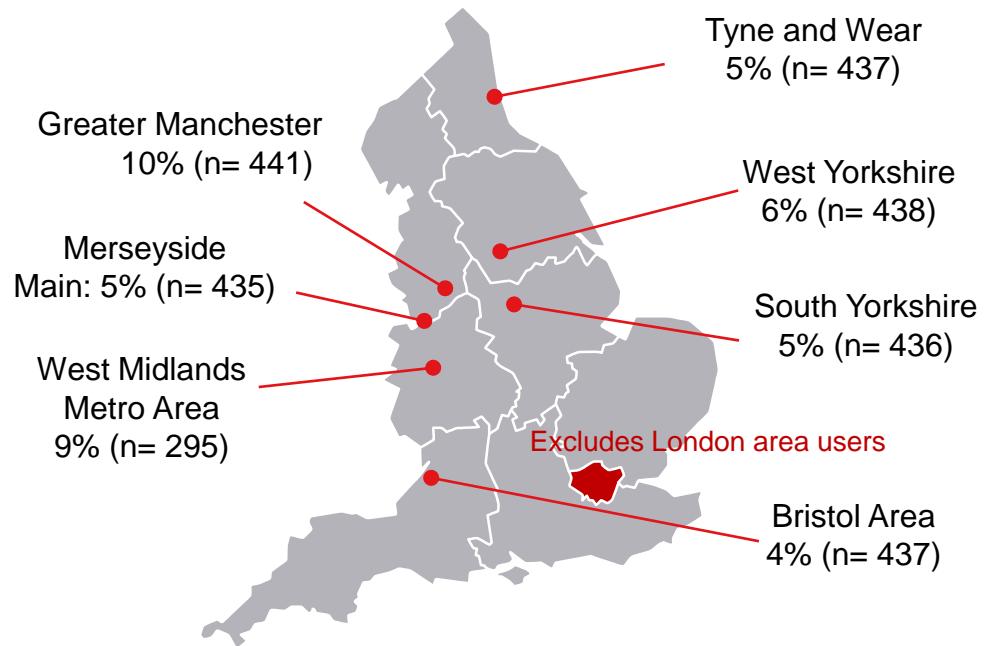
Use quarterly or more frequently n= 4,664

Share of main bus use by bus company

 Stagecoach	25%
 First Bus	24%
 ARRIVA a DB company	21%
 national express	6%
 Go-Ahead	5%
Other	14%
Don't Know	5%

Share of main bus use by seven PTE areas

44% in PTE



Other: 56% main bus use not in PTE: n=1,604

Q5. How often do you typically travel by bus?

Q7. In which areas do you use the bus most often?

Q10. Please tell us which bus company runs most of the bus services you use?

Base: all bus users n = 4664

Compared to non users, bus users tend to be slightly younger; are less likely to have a disability or access to a vehicle

Profile of respondents: all bus users versus non bus users

Gender

Bus users Non-users



49% **46%**

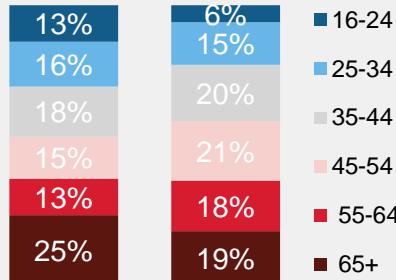


51% **54%**

Age

Bus users Non users

47 years (av.) 49 years (av.)



Social Grade

Bus users Non-users

- AB
- C1
- C2
- DE

27%

28%

28%

27%

21%

22%

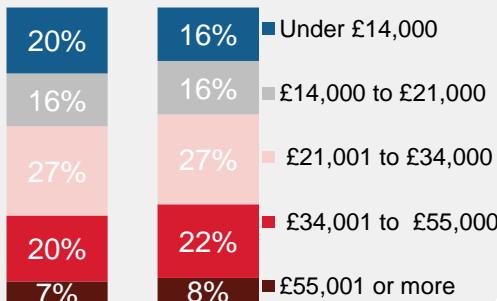
24%

23%

Household income

Bus users Non-users

£28,220 (av.) £30,090 (av.)



Disability

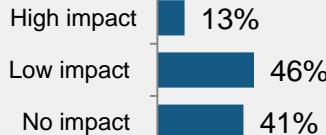
Bus users

24%

Non-users

28%

Impact of disability on ability to travel by bus:



Access to vehicle

Bus users Non-users

- Available all the time
- Available majority of the time
- Available some of the time
- Rarely, or never

48%

83%

16%

9%

14%

2%

22%

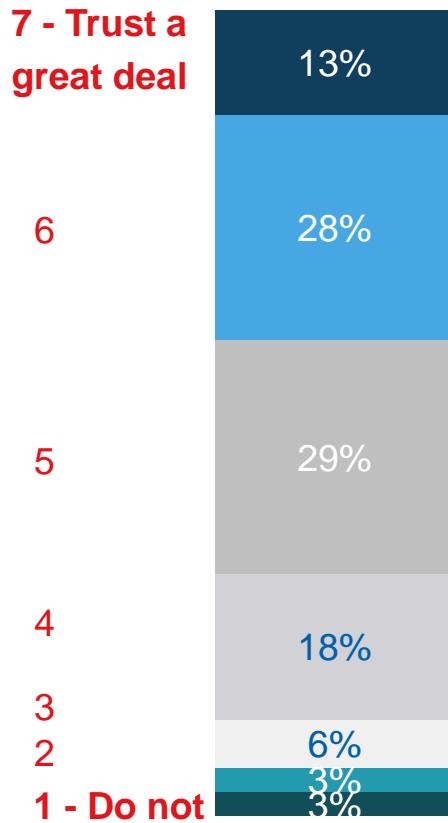
2%



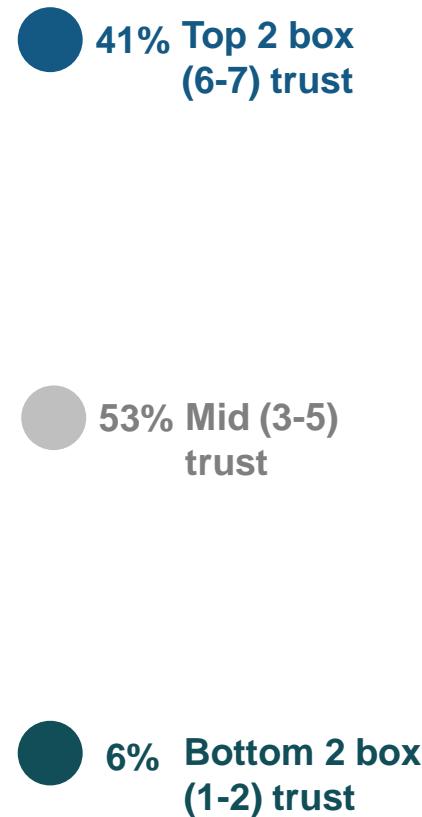
Attitudes and drivers of trust

Two-fifths of passengers give the bus company they use a high trust score – in line with rail

Level of trust with buses (1-7 scale): all bus users



All Bus Users



Rail Benchmark:
Top 2 box (6-7) trust



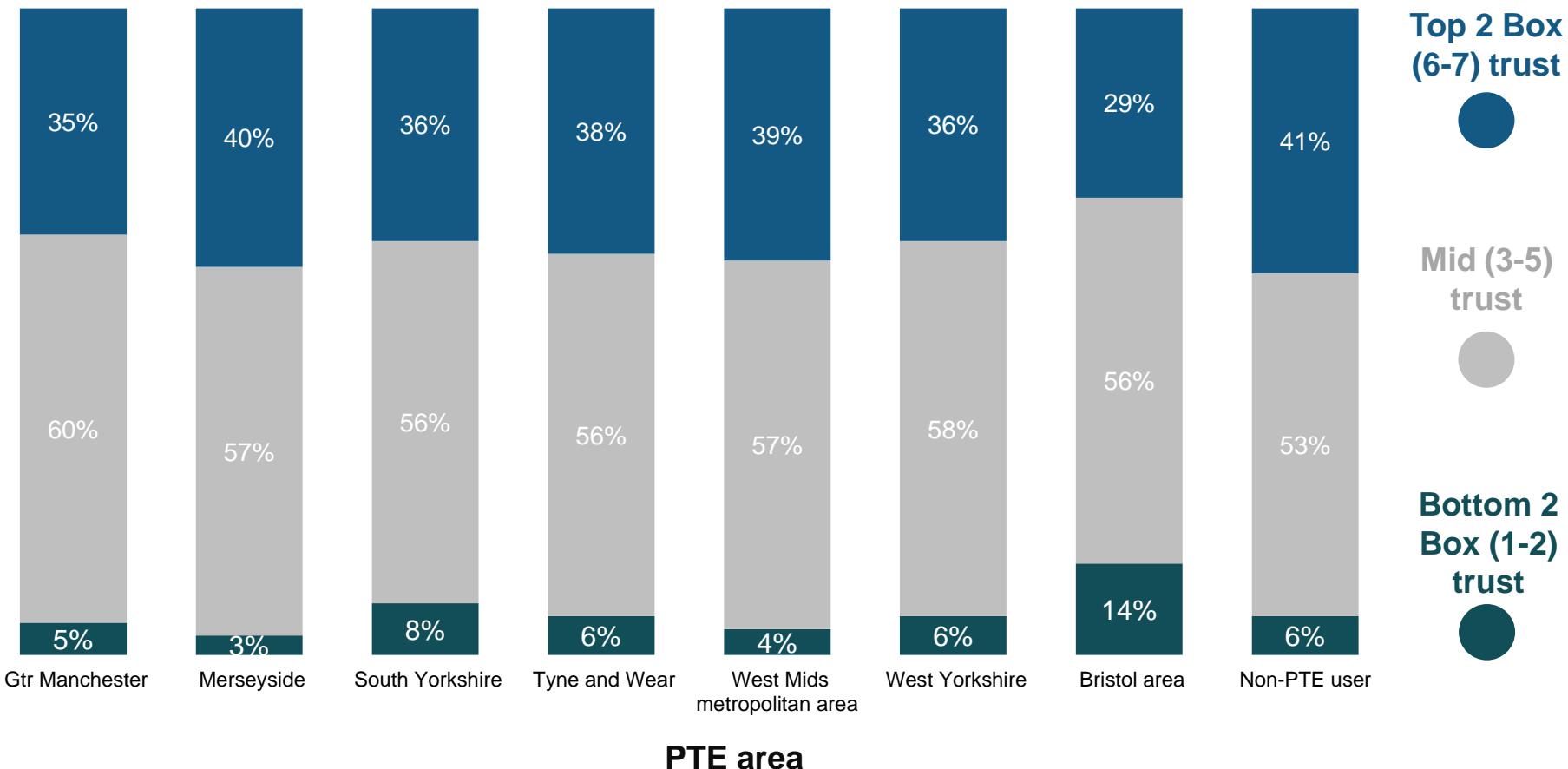
Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

Base: all bus users n=4,664

Source: Transport Focus: Aug 2014

Trust varies across the PTEs

Level of trust by PTE area: all bus users



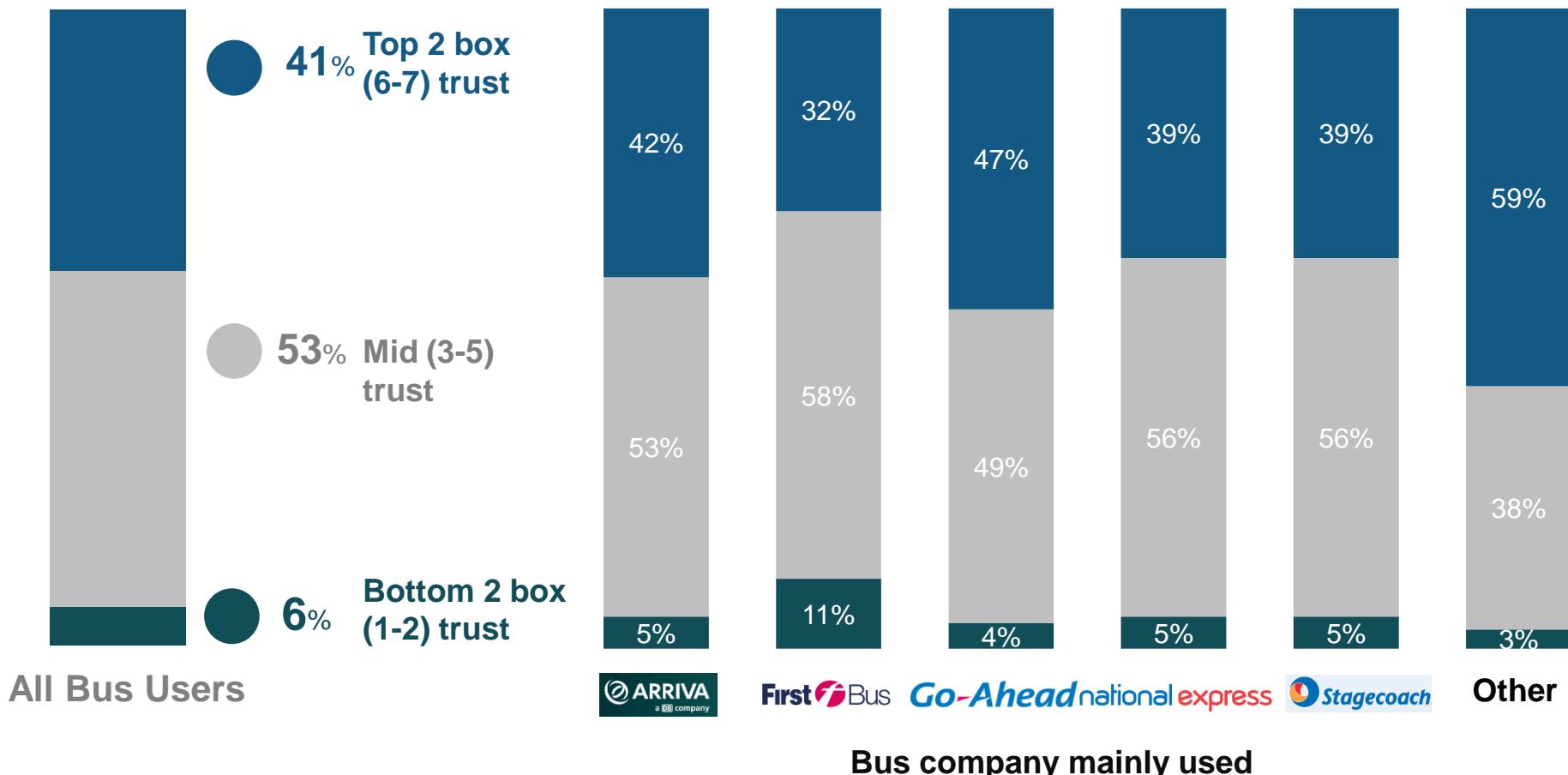
Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

Base: all bus users n=4,664; individual PTE base sizes range from 435 to 441



Trust varies across the major bus companies

Level of trust with bus company mainly used: all bus users

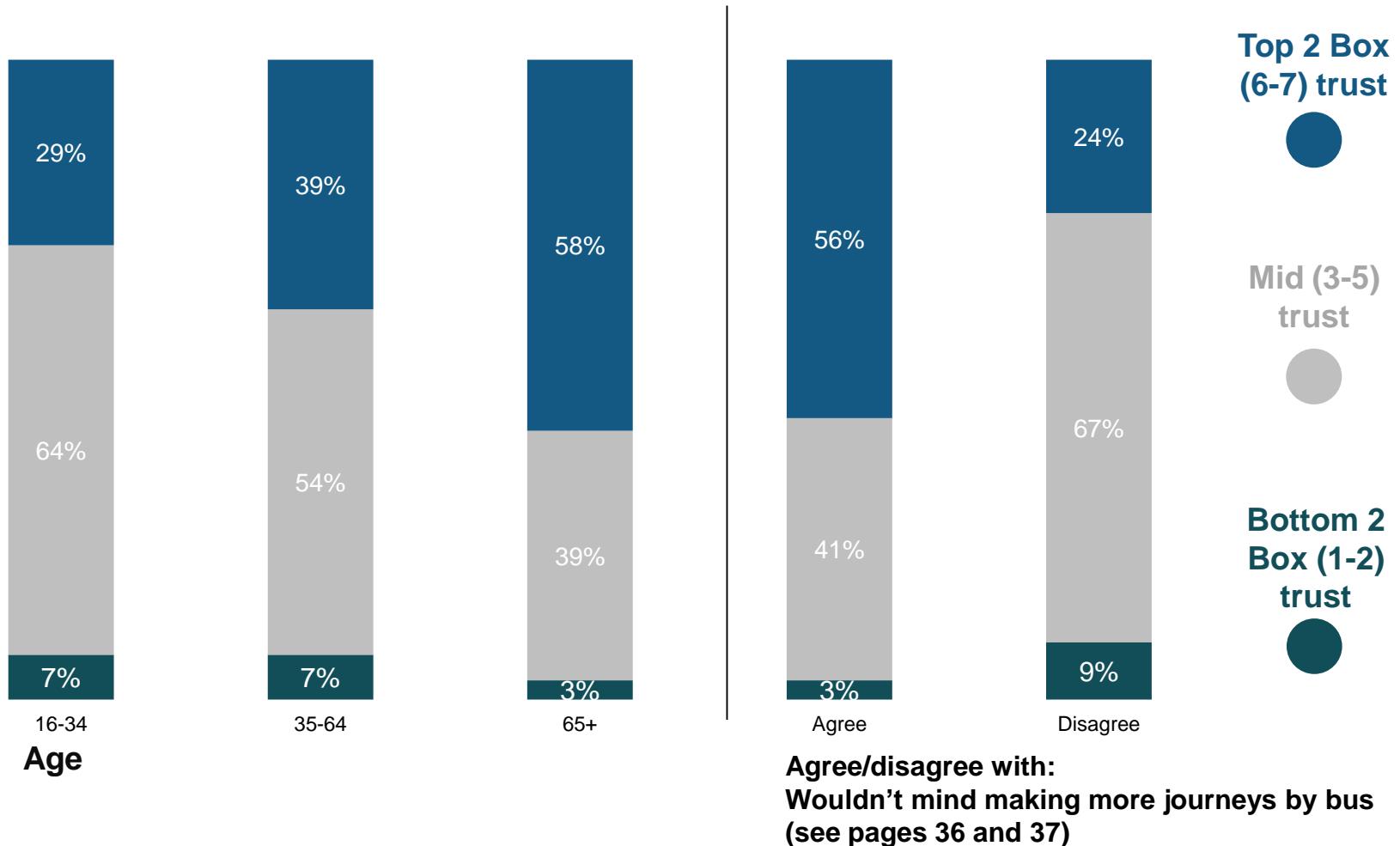


Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

Base: all bus users n=4,664; Go Ahead n=174; Arriva n=1,118; Stagecoach n=1,014; National Express n=294; First Bus n=1,324.

Trust in bus companies increases with age. Those not minded to make more bus journeys trust much less

Level of trust by subgroup: all bus users



Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

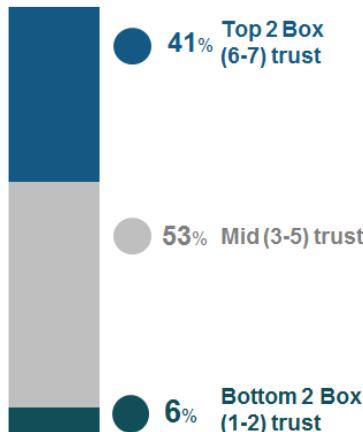
Base: age 16 to 34 = 930 ; 35 to 64 = 2411; age 65+ = 1323; agree 2577; disagree 2087 (includes neither/nor)

What drives trust in bus companies

3 stages to understanding what drives passenger trust of bus companies

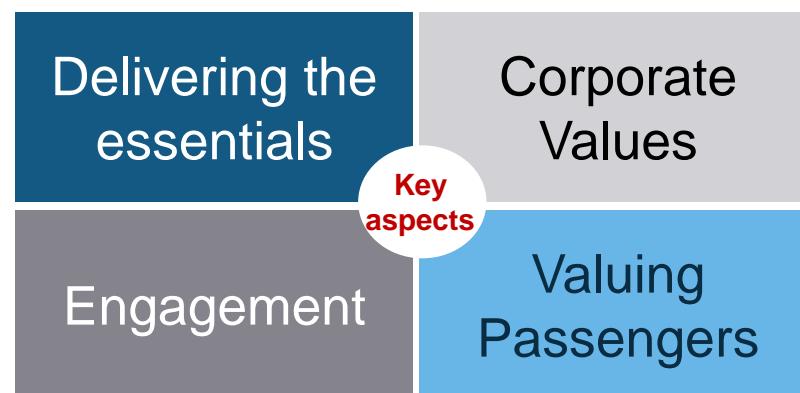
1

Measure
overall trust



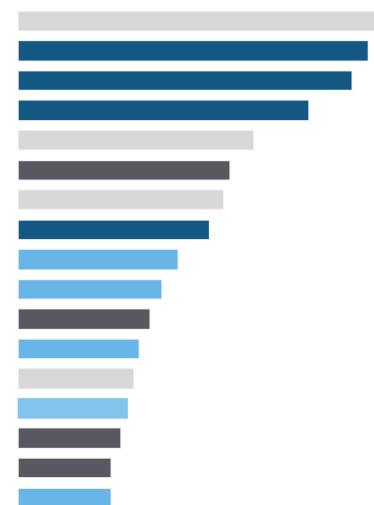
2

Measure passengers
agreement with trust
attributes across 4 key
aspects



3

Model relationship of
trust with attitudes to
assess drivers



Higher agreement with bus driver attributes (considerate, care, keeping eye out), professionally managed and reliability

Attitudes towards bus company mainly used - % agree: all bus users

✓ Above av
✗ Below av

Delivering the essentials

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

% agree bus
company...

Corporate Values

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

Engagement

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

Valuing Passengers

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

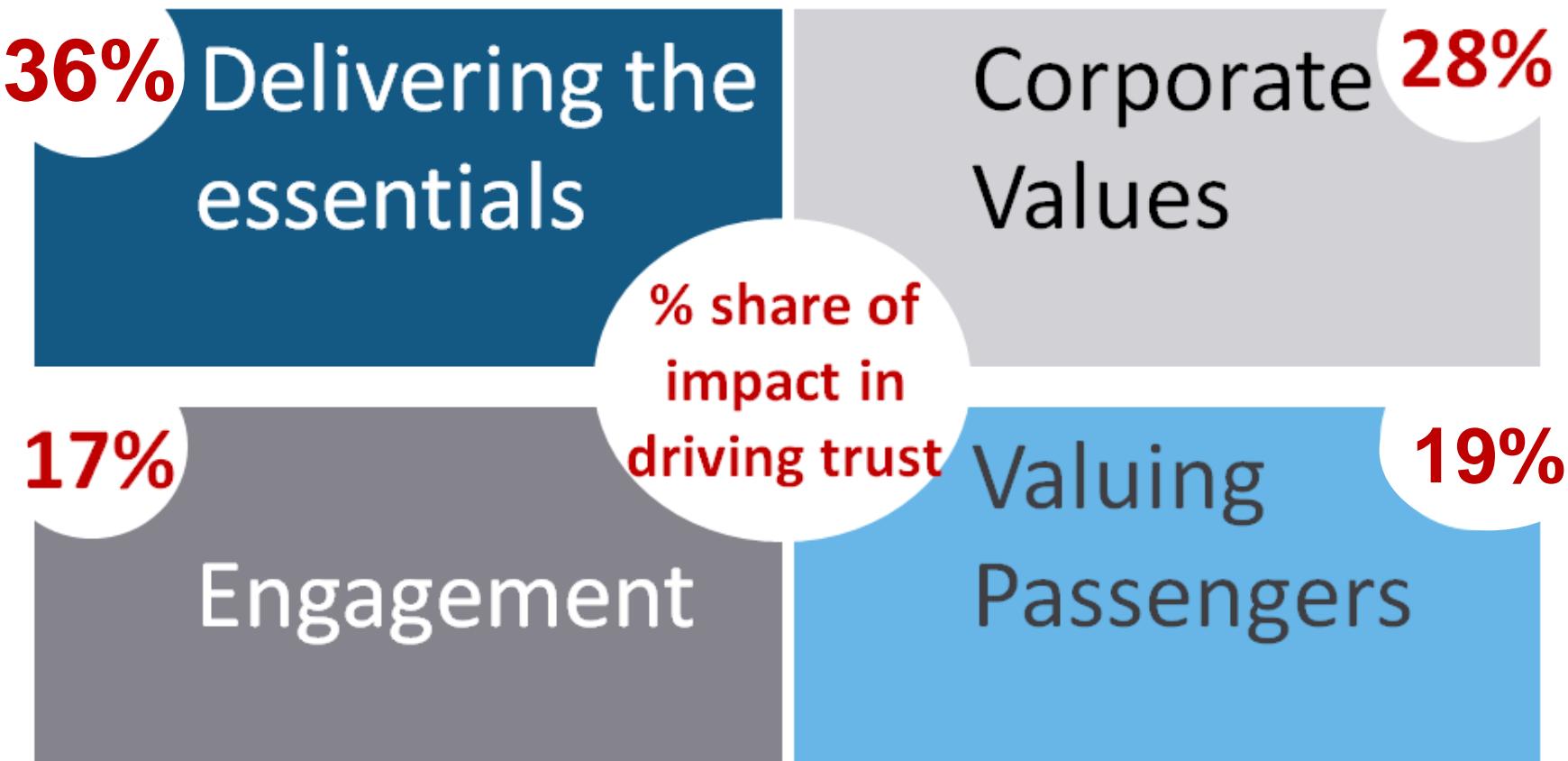
Average agreement level = 48%



Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
Base: all bus users n=4,664

Delivering the essentials drives the highest share of trust, followed by corporate values

Drivers of trust - share of contribution to overall trust: all bus users



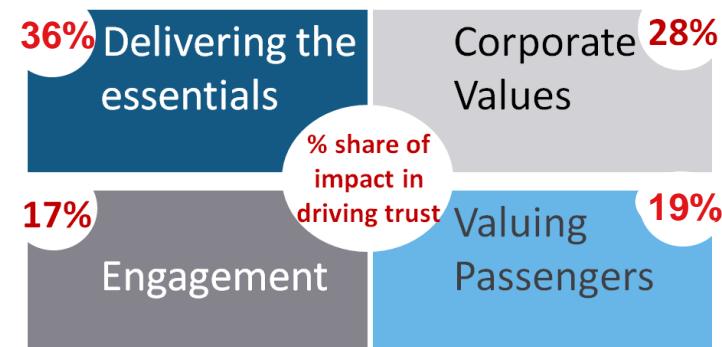
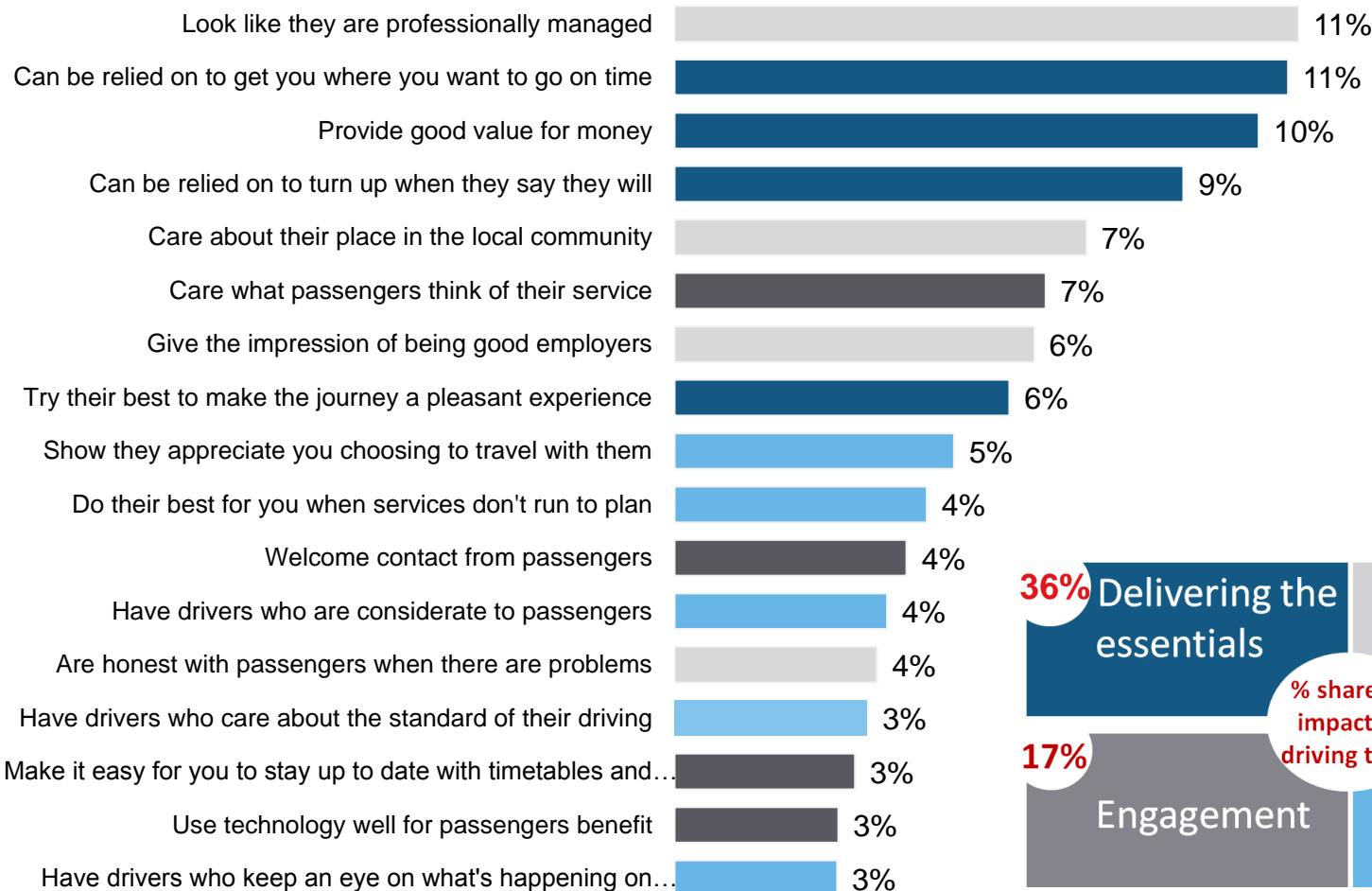
Q17. To what extent do you agree or disagree with each of the following statements?

Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

Base: all bus users n=4,664. R-squared = 58%

Drivers of trust focus on being professionally managed, offering reliability/value, and caring (community/passengers)

Drivers of trust - share of contribution to overall trust: all bus users



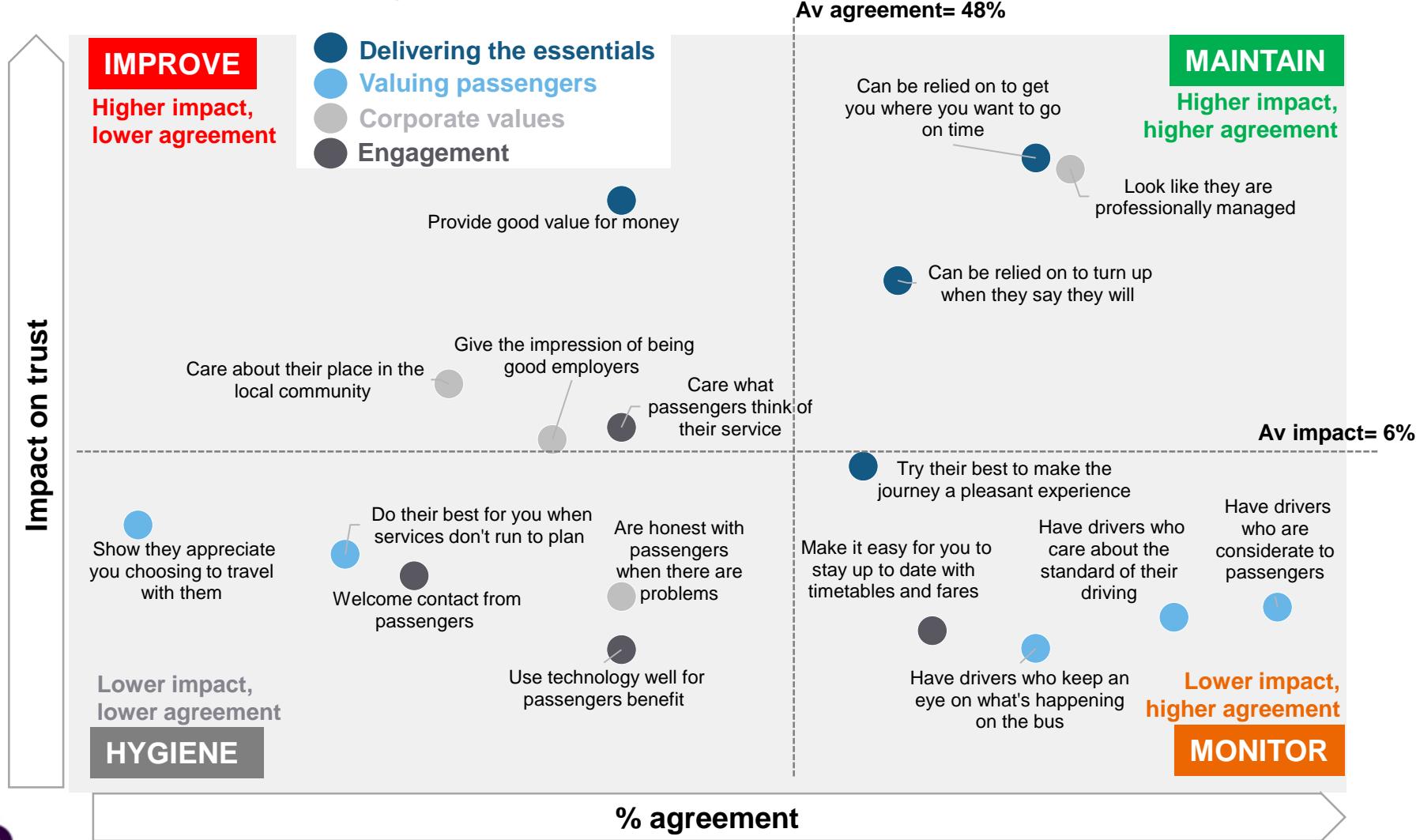
Q17. To what extent do you agree or disagree with each of the following statements?

Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

Base: all bus users n=4,664. R-squared = 58%

Outside of value for money, key areas to improve are improving the perceptions of care (community/passengers) and being good employers

Priority matrix for improving bus company trust: all bus users



Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
 Base: all bus users n=4,664

Summary attitudinal agreement by PTE - % agreement

Attitudes towards bus company mainly used - % agree: all bus users by PTE

	Merseyside	West Mids	Tyne/We ar	South York	West York	Grt Manch	Bristol
Delivering the essentials							
Can be relied on to get you where you want to go on time	58%	53%	53%	51%	54%	54%	48%
Can be relied on to turn up when they say they will	53%	50%	51%	43%	49%	48%	43%
Try their best to make the journey a pleasant experience	50%	47%	52%	44%	47%	47%	47%
Provide good value for money	41%	44%	41%	43%	39%	46%	42%
Identity/ organisation							
Look like they are professionally managed	59%	54%	58%	54%	56%	55%	51%
Give the impression of being good employers	41%	43%	41%	41%	41%	44%	41%
Are honest with passengers when there are problems	38%	44%	42%	41%	41%	41%	41%
Care about their place in the local community	36%	41%	38%	36%	35%	37%	33%
Valuing passengers							
Have drivers who care about the standard of their driving	56%	54%	58%	56%	55%	56%	58%
Have drivers who are considerate to passengers	55%	59%	60%	57%	61%	57%	62%
Have drivers who keep an eye on what's happening on the bus	53%	53%	53%	50%	53%	48%	51%
Do their best for you when services don't run to plan	35%	36%	39%	35%	31%	38%	31%
Show they appreciate you choosing to travel with them	29%	32%	28%	28%	28%	30%	26%
Engagement							
Make it easy for you to stay up to date with timetables and fares	58%	53%	58%	50%	57%	60%	54%
Care what passengers think of their service	45%	43%	44%	40%	39%	41%	41%
Use technology well for passengers benefit	46%	46%	51%	43%	43%	38%	45%
Welcome contact from passengers	36%	36%	38%	36%	35%	36%	37%

Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
 Base: all bus users n=4,664; individual PTE base sizes range from 435 to 441



Drivers of trust by PTE – % share of contribution

Drivers of trust: each PTE's bus users

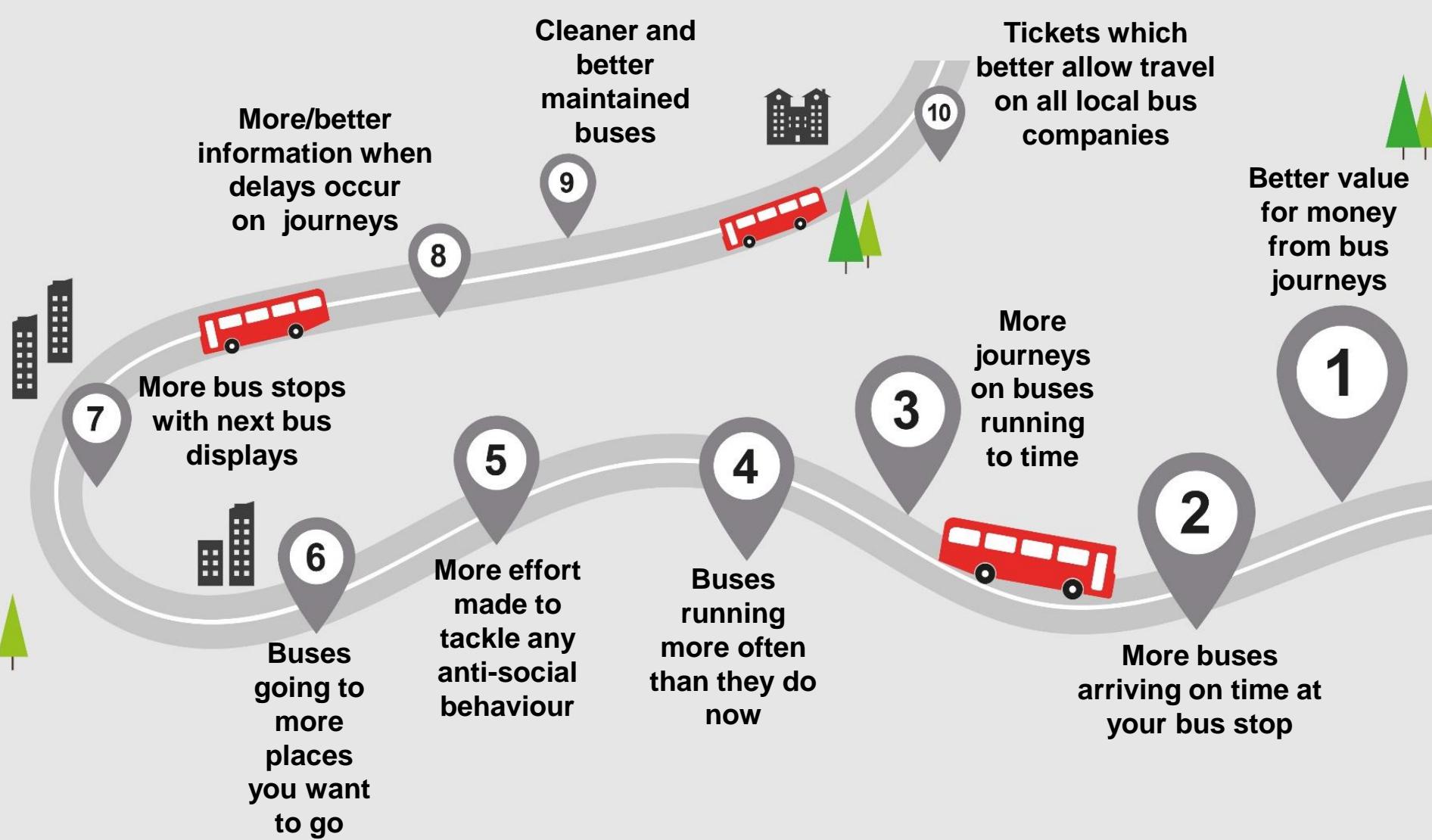
Ranked by agreement	Merseyside	West Mids	Tyne/ Wear	South York	West York	Grt Manch	Bristol
Delivering the essentials	38%	39%	41%	28%	34%	26%	26%
Can be relied on to get you where you want to go on time	11%	10%	13%	5%	5%	5%	11%
Can be relied on to turn up when they say they will	16%	7%	6%	8%	7%	6%	5%
Try their best to make the journey a pleasant experience	4%	9%	5%	7%	12%	5%	5%
Provide good value for money	7%	13%	17%	7%	9%	11%	5%
Identity/ organisation	25%	25%	24%	32%	28%	40%	31%
Look like they are professionally managed	9%	10%	7%	11%	7%	19%	14%
Give the impression of being good employers	6%	4%	6%	9%	3%	9%	6%
Are honest with passengers when there are problems	5%	3%	3%	4%	4%	3%	4%
Care about their place in the local community	5%	7%	7%	7%	14%	9%	7%
Valuing passengers	22%	19%	19%	23%	20%	21%	21%
Have drivers who care about the standard of their driving	4%	4%	3%	5%	3%	4%	4%
Have drivers who are considerate to passengers	5%	3%	3%	4%	3%	6%	4%
Have drivers who keep an eye on what's happening on the bus	4%	4%	4%	4%	5%	4%	4%
Do their best for you when services don't run to plan	5%	4%	4%	6%	5%	4%	5%
Show they appreciate you choosing to travel with them	4%	4%	5%	5%	3%	3%	5%
Engagement	15%	17%	16%	17%	18%	13%	21%
Make it easy for you to stay up to date with timetables and fares	4%	3%	3%	2%	5%	2%	4%
Care what passengers think of their service	3%	8%	5%	7%	5%	6%	10%
Use technology well for passengers benefit	4%	2%	3%	5%	4%	2%	3%
Welcome contact from passengers	4%	4%	5%	4%	5%	3%	4%

Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
 Base: all bus users n=4,664; individual PTE base sizes range from 435 to 441

Passengers priorities for improvement

Top priorities for improvement – price, punctuality and scheduling

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



Top priorities for improvement – price, punctuality and scheduling

Top priorities for improvement – above average of 100 index : all bus users



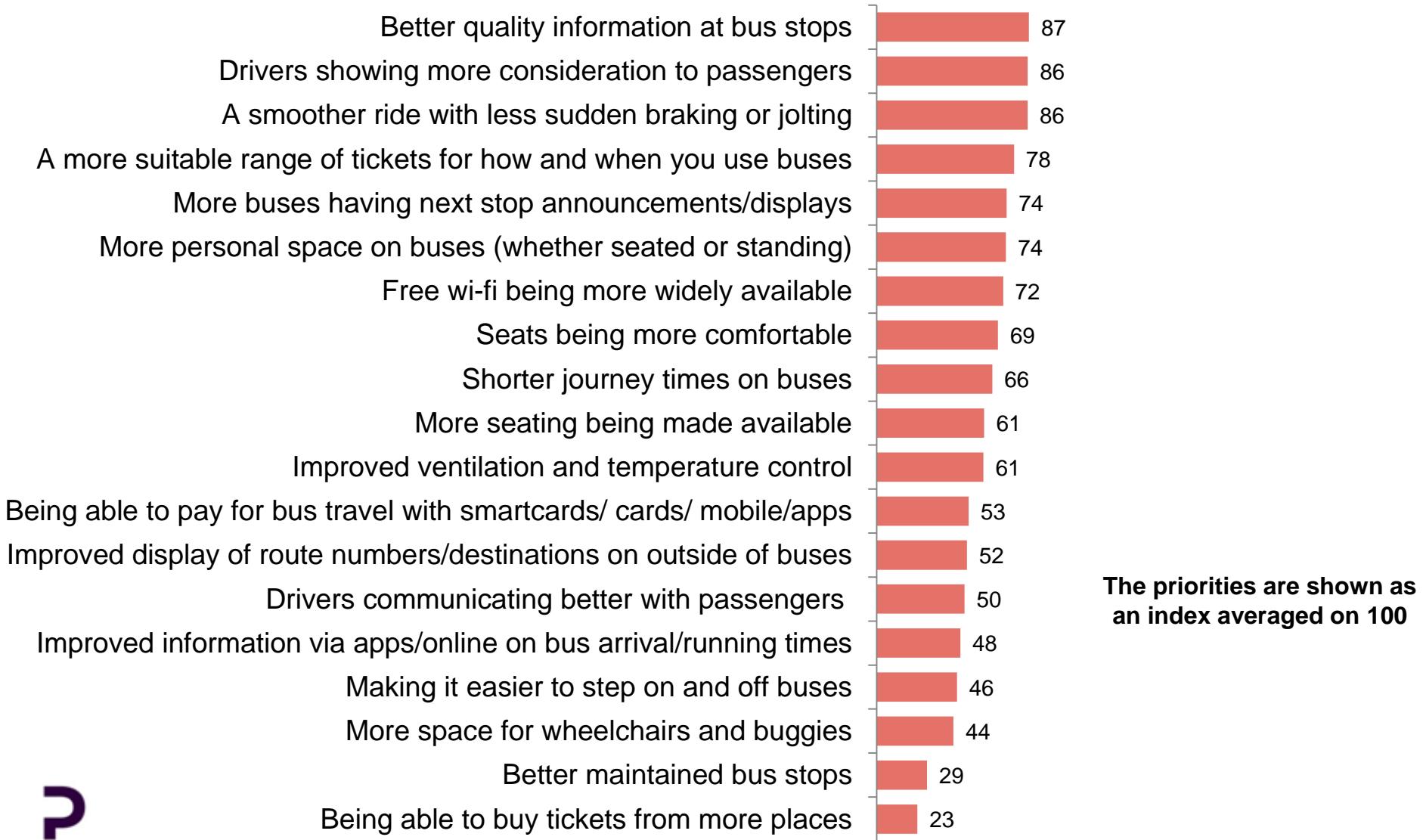
The priorities are shown as an index averaged on 100.

In this case 100 = the average share under the assumption of equal importance of all attributes. The number of points above 100 is equivalent to the ratio of actual preference share to this theoretical average. So for example 150 = 50% more important than average, 300 = three times as important as average, 50 = half as important as average.



Lower priorities includes ticketing options, maintaining bus stops, bus displays and info online/apps

Lower priorities for improvement – below average of 100 index: all bus users



The priorities are shown as
an index averaged on 100



Priorities broadly consistent by PTE – safety and dealing with anti-social behaviour increased priority in Gtr Manchester, W. Midlands

Priorities by PTE

	Overall	Merseyside	Greater Manchr	South Yorkshir	Tyne and	West Midland	West Yorkshire	Bristol area								
Better value for money from bus journeys	258	1	285	1	269	1	290	1	287	1	256	1	287	1	259	2
More buses arriving on time at your bus stop	247	2	215	2	233	2	249	2	233	2	229	2	249	2	270	1
More journeys on buses running to time	228	3	202	3	218	3	233	4	218	3	211	4	231	4	250	4
Buses running more often than they do now	224	4	193	4	205	4	233	3	215	4	204	5	233	3	254	3
<u>More effort made to tackle any anti-social behaviour</u>	174	5	171	5	197	5	180	5	168	5	221	3	169	5	140	6
Buses going to more places you want to go	158	6	149	6	153	6	164	6	157	6	150	6	162	6	169	5
More bus stops with next bus displays	121	7	131	7	117	8	109	8	107	8	103	10	115	8	133	7
Being given more/better information when delays occur on journeys	110	8	110	9	111	10	106	9	106	9	106	9	108	9	116	8
Cleaner and better maintained buses	107	9	106	11	107	11	102	11	104	11	114	8	100	11	95	11
<u>Tickets which better allow travel on all local bus companies</u>	107	10	127	8	111	9	117	7	118	7	101	11	120	7	104	9
<u>Better security at bus stops so people feel safer waiting for buses</u>	104	11	107	10	121	7	106	10	105	10	132	7	102	10	87	13
Drivers allowing more time for passengers to get to their seats	103	12	92	14	91	12	88	12	91	13	100	12	98	12	82	14
Better quality information at bus stops	87	13	92	13	86	13	80	14	80	17	79	16	84	14	93	12
Drivers showing more consideration to passengers	86	14	82	17	83	15	79	15	82	15	88	14	83	15	75	17
A smoother ride with less sudden braking or jolting	86	15	76	18	74	18	75	17	81	16	83	15	78	17	70	19
A more suitable range of tickets for how and when you use buses	78	16	96	12	83	14	86	13	89	14	76	17	88	13	77	16
More buses having next stop announcements/displays	74	17	86	16	75	17	69	19	69	20	68	20	73	18	79	15
More personal space on buses (whether seated or standing)	74	18	71	19	71	19	69	20	74	18	74	18	64	20	62	21
<u>Free wi-fi being more widely available</u>	72	19	89	15	78	16	75	16	100	12	95	13	82	16	96	10
Seats being more comfortable	69	20	68	20	65	21	64	21	72	19	69	19	60	21	58	23
Shorter journey times on buses	66	21	63	21	67	20	71	18	68	21	66	21	66	19	71	18
More seating being made available	61	22	59	24	60	24	59	22	61	22	61	23	56	22	55	24
Improved ventilation and temperature control	61	23	63	22	60	23	57	23	61	23	64	22	55	23	52	26
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	61	23	64	22	57	24	60	24	51	25	53	24	66	20
Improved display of route numbers and destinations on the outside of buses	52	25	55	26	53	25	49	26	50	26	50	26	50	25	53	25
Drivers communicating better with passengers	50	26	50	27	49	27	47	27	49	27	52	24	49	26	45	27
Improved information via apps/online on bus arrival/running times	48	27	56	25	52	26	50	25	53	25	47	27	48	27	58	22
Making it easier to step on and off buses	46	28	45	28	43	29	41	28	43	28	46	28	43	28	38	28
More space for wheelchairs and buggies	44	29	44	29	43	28	41	29	42	29	45	29	43	29	38	29
Better maintained bus stops	29	30	31	30	30	30	28	30	29	30	32	30	28	30	27	30
Being able to buy tickets from more places	23	31	27	31	27	31	24	31	26	31	24	31	24	31	26	31

Base: all bus users n=4,664; individual PTE base sizes range from 435 to 441



Older passengers less likely to be focused on the price and availability; younger passengers emphasise Wi-Fi

Priorities by age/gender

	Overall	Male			Female			
		M 16-34	M 35-64	M 65+	F 16-34	F 35-64	F 65+	
Better value for money from bus journeys	258	1	284	1	297	1	130	9
More buses arriving on time at your bus stop	247	2	214	2	244	2	269	1
More journeys on buses running to time	228	3	204	3	230	3	233	2
Buses running more often than they do now	224	4	196	4	229	4	223	3
More effort made to tackle any anti-social behaviour	174	5	160	5	174	5	176	4
Buses going to more places you want to go	158	6	150	7	166	6	144	7
More bus stops with next bus displays	121	7	107	10	110	8	160	6
Being given more/better information when delays occur on journeys	110	8	108	9	107	9	121	11
Cleaner and better maintained buses	107	9	102	12	102	11	123	10
Tickets which better allow travel on all local bus companies	107	10	122	8	119	7	54	24
Better security at bus stops so people feel safer waiting for buses	104	11	103	11	105	10	101	14
Drivers allowing more time for passengers to get to their seats	103	12	68	21	78	15	175	5
Better quality information at bus stops	87	13	80	15	81	14	108	13
Drivers showing more consideration to passengers	86	14	71	18	75	16	119	12
A smoother ride with less sudden braking or jolting	86	15	65	23	71	19	137	8
A more suitable range of tickets for how and when you use buses	78	16	98	13	89	12	33	26
More buses having next stop announcements/displays	74	17	74	17	69	20	64	15
More personal space on buses (whether seated or standing)	74	18	69	20	72	17	89	16
Free wi-fi being more widely available	72	19	156	6	88	13	20	30
Seats being more comfortable	69	20	66	22	68	21	81	17
Shorter journey times on buses	66	21	77	16	72	18	49	25
More seating being made available	61	22	60	25	61	22	66	20
Improved ventilation and temperature control	61	23	61	24	58	24	71	18
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	93	14	59	23	21	29
Improved display of route numbers / destinations on outside of buses	52	25	54	26	50	26	56	22
Drivers communicating better with passengers	50	26	46	27	45	27	64	21
Improved information via apps/online on bus arrival/running times	48	27	71	19	51	25	30	27
Making it easier to step on and off buses	46	28	38	29	39	28	66	19
More space for wheelchairs and buggies	44	29	39	28	39	29	56	23
Better maintained bus stops	29	30	31	31	28	30	30	28
Being able to buy tickets from more places	23	31	35	30	26	31	11	31

Base: all bus users n=4,664; M 16 to 34 = 339; M 35 to 64 = 1211; M 65+ = 726; F 16 to 34 = 591; F 35 to 64 = 1200; F 65+ = 597



Those without a free pass prioritise better value for money tickets which allow travel on multiple local bus companies

Priorities by

	Overall	Do not have free pass	Have free pass	
<u>Better value for money from bus journeys</u>	258	1	142	8
More buses arriving on time at your bus stop	247	2	271	1
More journeys on buses running to time	228	3	238	2
Buses running more often than they do now	224	4	233	3
More effort made to tackle any anti-social behaviour	174	5	170	4
Buses going to more places you want to go	158	6	150	6
More bus stops with next bus displays	121	7	156	5
Being given more/better information when delays occur on journeys	110	8	120	11
Cleaner and better maintained buses	107	9	121	10
<u>Tickets which better allow travel on all local bus companies</u>	107	10	56	23
Better security at bus stops so people feel safer waiting for buses	104	11	98	14
<u>Drivers allowing more time for passengers to get to their seats</u>	103	12	149	7
Better quality information at bus stops	87	13	105	13
Drivers showing more consideration to passengers	86	14	108	12
A smoother ride with less sudden braking or jolting	86	15	124	9
<u>A more suitable range of tickets for how and when you use buses</u>	78	16	36	26
<u>More buses having next stop announcements/displays</u>	74	17	87	16
More personal space on buses (whether seated or standing)	74	18	89	15
<u>Free wi-fi being more widely available</u>	72	19	33	28
Seats being more comfortable	69	20	86	17
Shorter journey times on buses	66	21	57	22
More seating being made available	61	22	69	19
Improved ventilation and temperature control	61	23	73	18
<u>Being able to pay for bus travel with smartcards/ contactless cards etc.</u>	53	24	25	30
Improved display of route numbers / destinations on outside of buses	52	25	56	24
Drivers communicating better with passengers	50	26	60	21
Improved information via apps/online on bus arrival/running times	48	27	34	27
Making it easier to step on and off buses	46	28	60	20
More space for wheelchairs and buggies	44	29	51	25
Better maintained bus stops	29	30	30	29
Being able to buy tickets from more places	23	31	13	31

Free pass

32% bus users



Passengers with disabilities impacting bus travel prioritise tackling anti-social behaviour

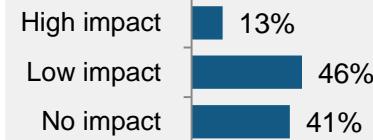
Priorities by level of impact disability has on travelling by bus

	Overall	Yes high impact	Yes low impact	No impact
Better value for money from bus journeys	258	1	183	4
More buses arriving on time at your bus stop	247	2	204	2
More journeys on buses running to time	228	3	187	3
Buses running more often than they do now	224	4	163	5
<u>More effort made to tackle any anti-social behaviour</u>	174	5	230	1
Buses going to more places you want to go	158	6	128	9
More bus stops with next bus displays	121	7	116	11
Being given more/better information when delays occur on journeys	110	8	108	13
<u>Cleaner and better maintained buses</u>	107	9	135	8
Tickets which better allow travel on all local bus companies	107	10	74	20
Better security at bus stops so people feel safer waiting for buses	104	11	136	7
<u>Drivers allowing more time for passengers to get to their seats</u>	103	12	155	6
Better quality information at bus stops	87	13	86	16
Drivers showing more consideration to passengers	86	14	115	12
<u>A smoother ride with less sudden braking or jolting</u>	86	15	124	10
A more suitable range of tickets for how and when you use buses	78	16	48	26
More buses having next stop announcements/displays	74	17	76	18
<u>More personal space on buses (whether seated or standing)</u>	74	18	100	14
Free wi-fi being more widely available	72	19	39	28
Seats being more comfortable	69	20	93	15
Shorter journey times on buses	66	21	54	25
More seating being made available	61	22	75	19
Improved ventilation and temperature control	61	23	84	17
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	46	27
Improved display of route numbers / destinations on outside of buses	52	25	55	24
Drivers communicating better with passengers	50	26	65	22
Improved information via apps/online on bus arrival/running times	48	27	38	29
<u>Making it easier to step on and off buses</u>	46	28	66	21
More space for wheelchairs and buggies	44	29	60	23
Better maintained bus stops	29	30	35	30
Being able to buy tickets from more places	23	31	21	31

**Disability
24% bus users**



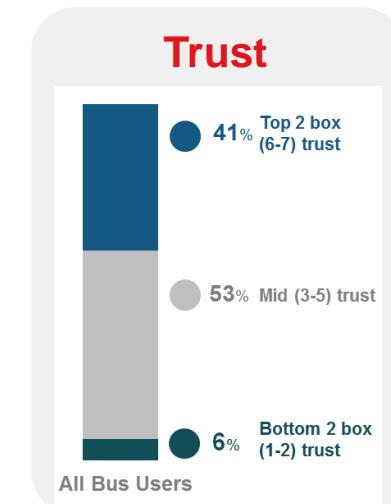
Impact of disability on ability to travel by bus:



Those who don't trust their bus company place higher importance on delivering the essentials

Priorities by trust in bus company

	Overall	Trust [6-7]	Don't trust [1- 2]
Better value for money from bus journeys	258	1	296
More buses arriving on time at your bus stop	247	2	310
More journeys on buses running to time	228	3	284
Buses running more often than they do now	224	4	311
More effort made to tackle any anti-social behaviour	174	5	150
Buses going to more places you want to go	158	6	187
More bus stops with next bus displays	121	7	95
Being given more/better information when delays occur on journeys	110	8	102
Cleaner and better maintained buses	107	9	92
Tickets which better allow travel on all local bus companies	107	10	113
Better security at bus stops so people feel safer waiting for buses	104	11	84
Drivers allowing more time for passengers to get to their seats	103	12	100
Better quality information at bus stops	87	13	72
Drivers showing more consideration to passengers	86	14	81
A smoother ride with less sudden braking or jolting	86	15	81
A more suitable range of tickets for how and when you use buses	78	16	78
More buses having next stop announcements/displays	74	17	54
More personal space on buses (whether seated or standing)	74	18	60
Free wi-fi being more widely available	72	19	40
Seats being more comfortable	69	20	55
Shorter journey times on buses	66	21	75
More seating being made available	61	22	55
Improved ventilation and temperature control	61	23	47
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	34
Improved display of route numbers / destinations on outside of buses	52	25	42
Drivers communicating better with passengers	50	26	45
Improved information via apps/online on bus arrival/running times	48	27	35
Making it easier to step on and off buses	46	28	40
More space for wheelchairs and buggies	44	29	39
Better maintained bus stops	29	30	23
Being able to buy tickets from more places	23	31	18

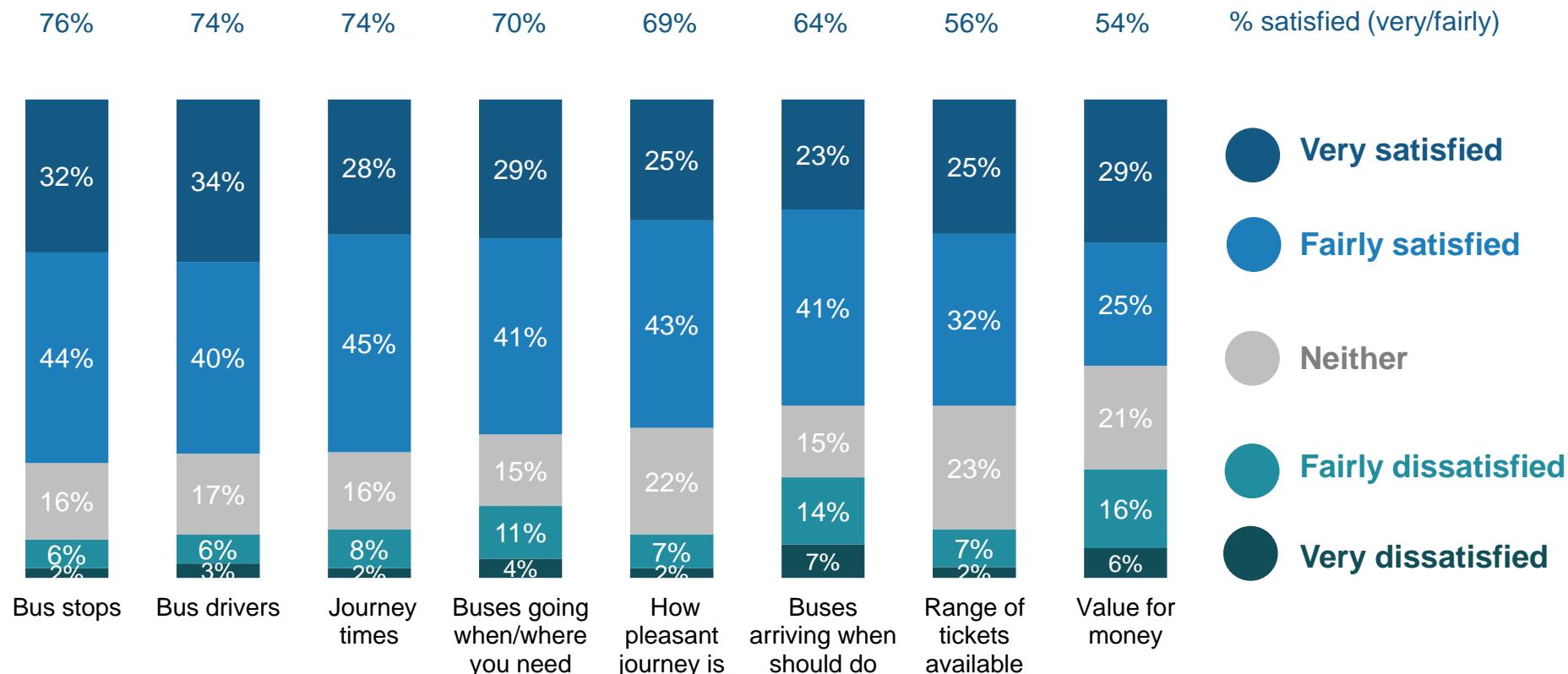


Priorities for improvement and satisfaction

Better levels of satisfaction with bus drivers and bus stops - lower levels with range of tickets, punctuality and value for money

Satisfaction with aspects of bus use: all bus users

Ranked in order of % satisfied →



Q12. Still thinking about the bus company that runs most of the services you use, how satisfied or dissatisfied are you with the following?
Base: all bus users n=4,664

Satisfaction with service aspects varies by PTE area

Top 2 box satisfaction summary: all bus users by PTE mainly used

	Bus stops	Bus drivers	Journey times	Buses going when /where needed	How pleasant journey is	Buses arriving when should do	Range of tickets available	Value for money
Higher								
Lower								
significantly different to bus users at 95%								
Merseyside	79%	73%	81%	74%	74%	67%	58%	52%
Tyne and Wear	76%	73%	77%	73%	70%	62%	62%	51%
West Yorkshire	75%	72%	71%	72%	66%	63%	62%	54%
West Mids area	76%	69%	70%	72%	63%	60%	62%	53%
Gtr Manchester	72%	70%	70%	71%	63%	58%	58%	55%
South Yorkshire	77%	67%	70%	68%	61%	57%	59%	52%
Bristol area	73%	71%	63%	59%	65%	53%	54%	48%

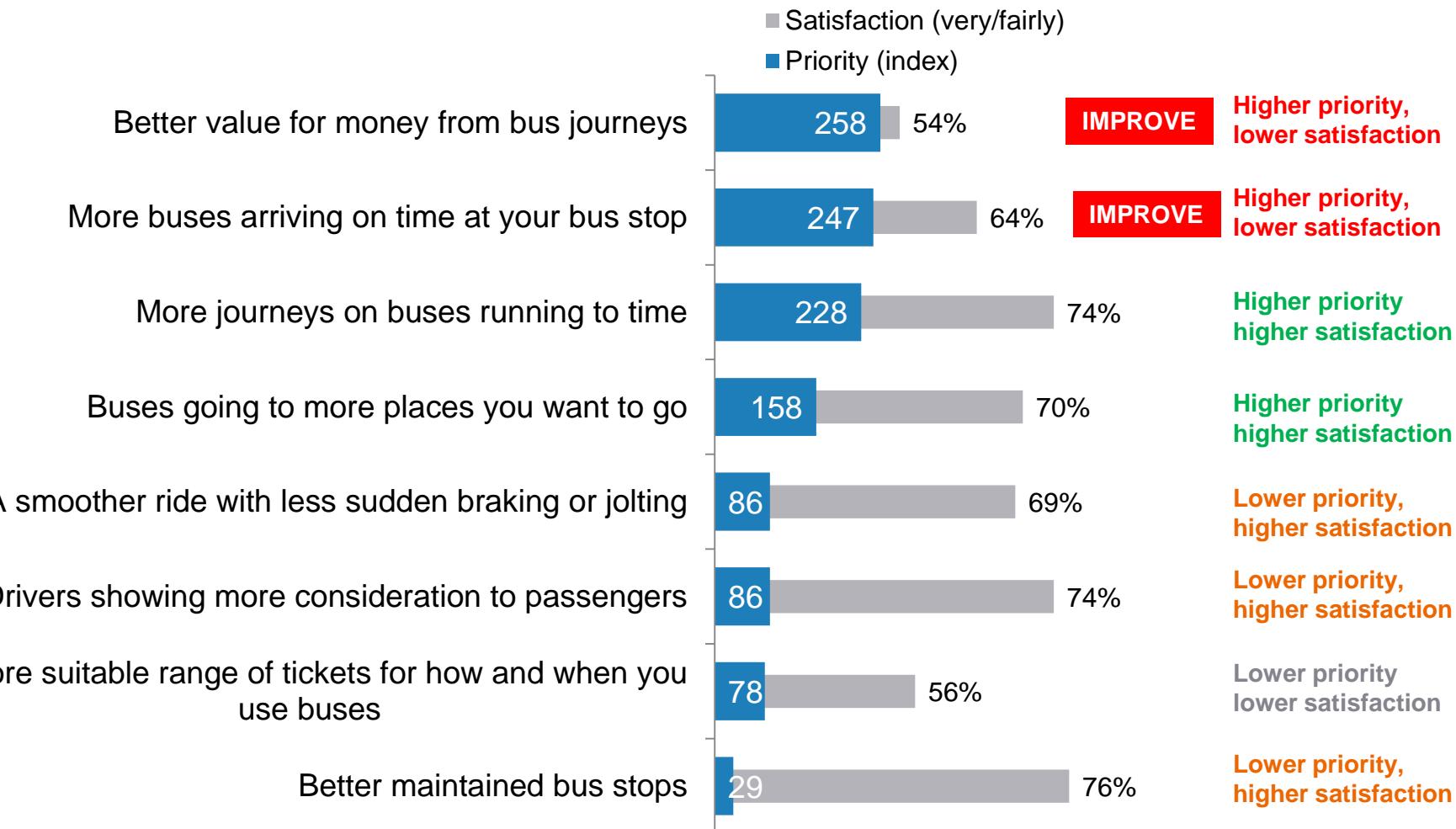


Q12. Still thinking about the bus company that runs most of the services you use, how satisfied or dissatisfied are you with the following?

Base: all bus users n=4,664; individual PTE base sizes range from 435 to 441

Value for money and buses arriving on time are key passenger priorities that show lower levels of satisfaction

Key satisfaction measures versus priorities: all bus users

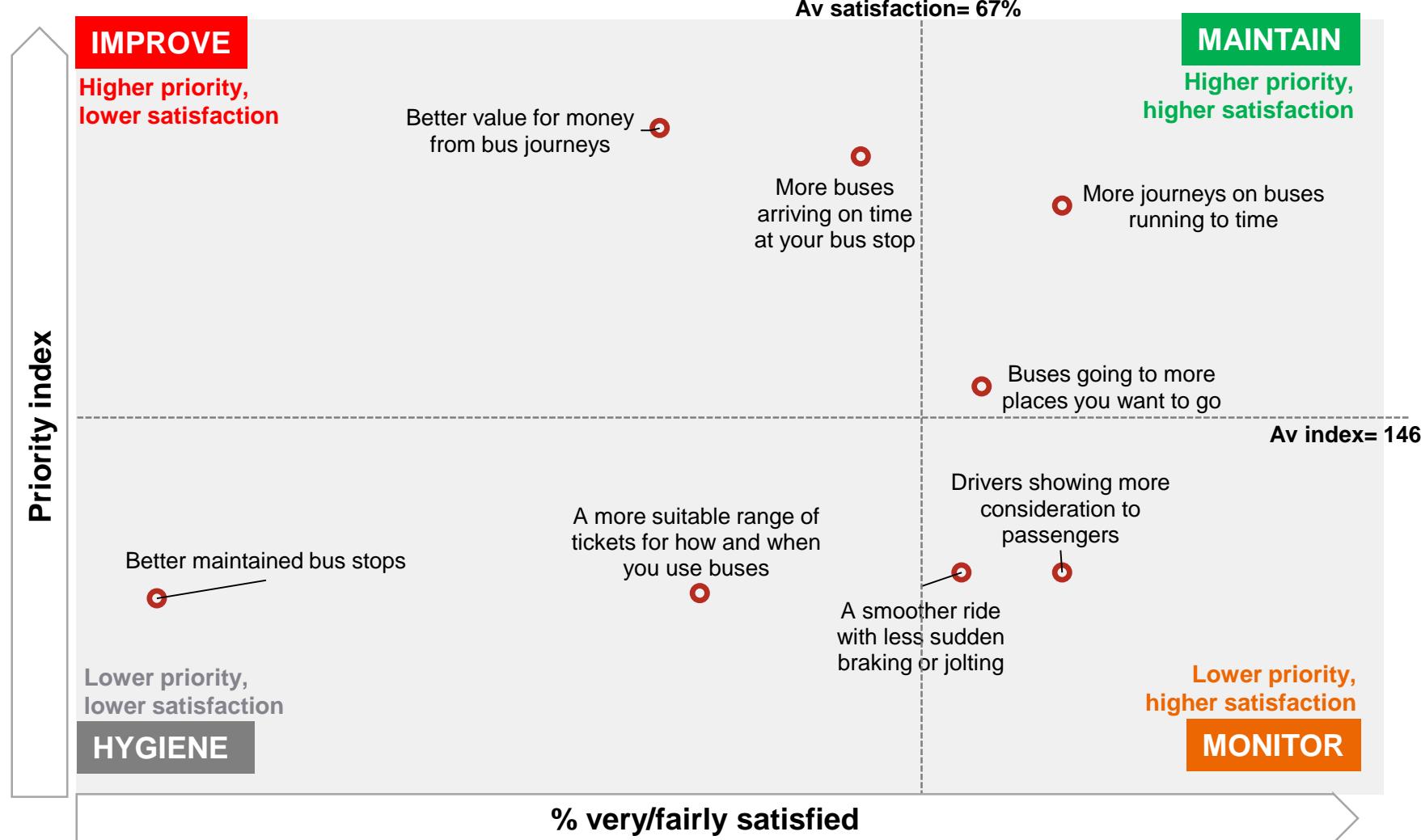


Q12. Still thinking about the bus company that runs most of the services you use, how satisfied or dissatisfied are you with the following?

Base: all bus users n=4,664

Key areas for improvement are improving value for money and buses arriving on time at bus stops

Priority matrix for key satisfaction measures versus priorities: all bus users

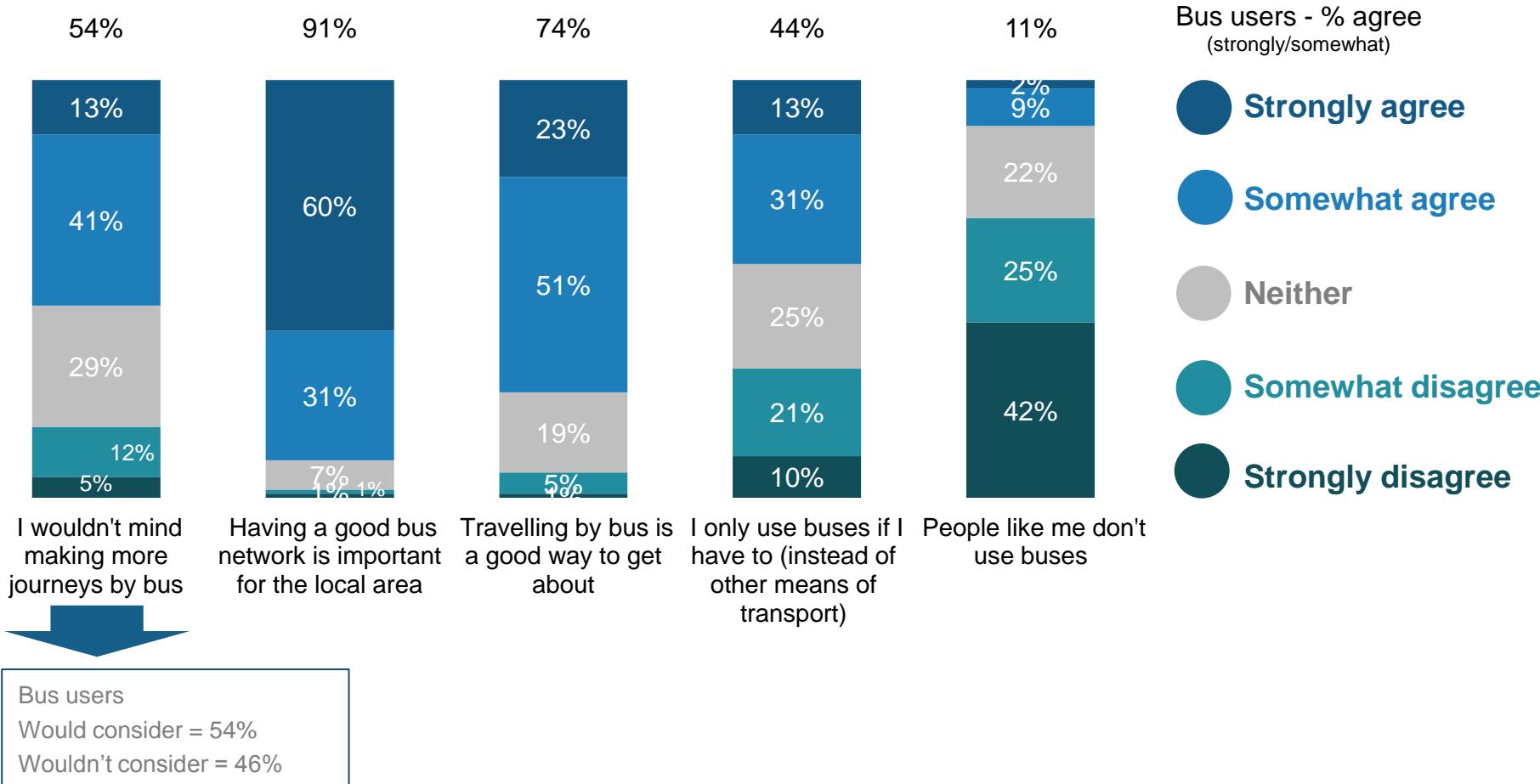


Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
Base: all bus users n=4,664

Bus users versus non-users: attitudes to bus travel

Around half of users wouldn't mind making more trips by bus. Most users agree the bus network is important for the local area, and is a good form of transport.

Per cent agree with statement: all bus users

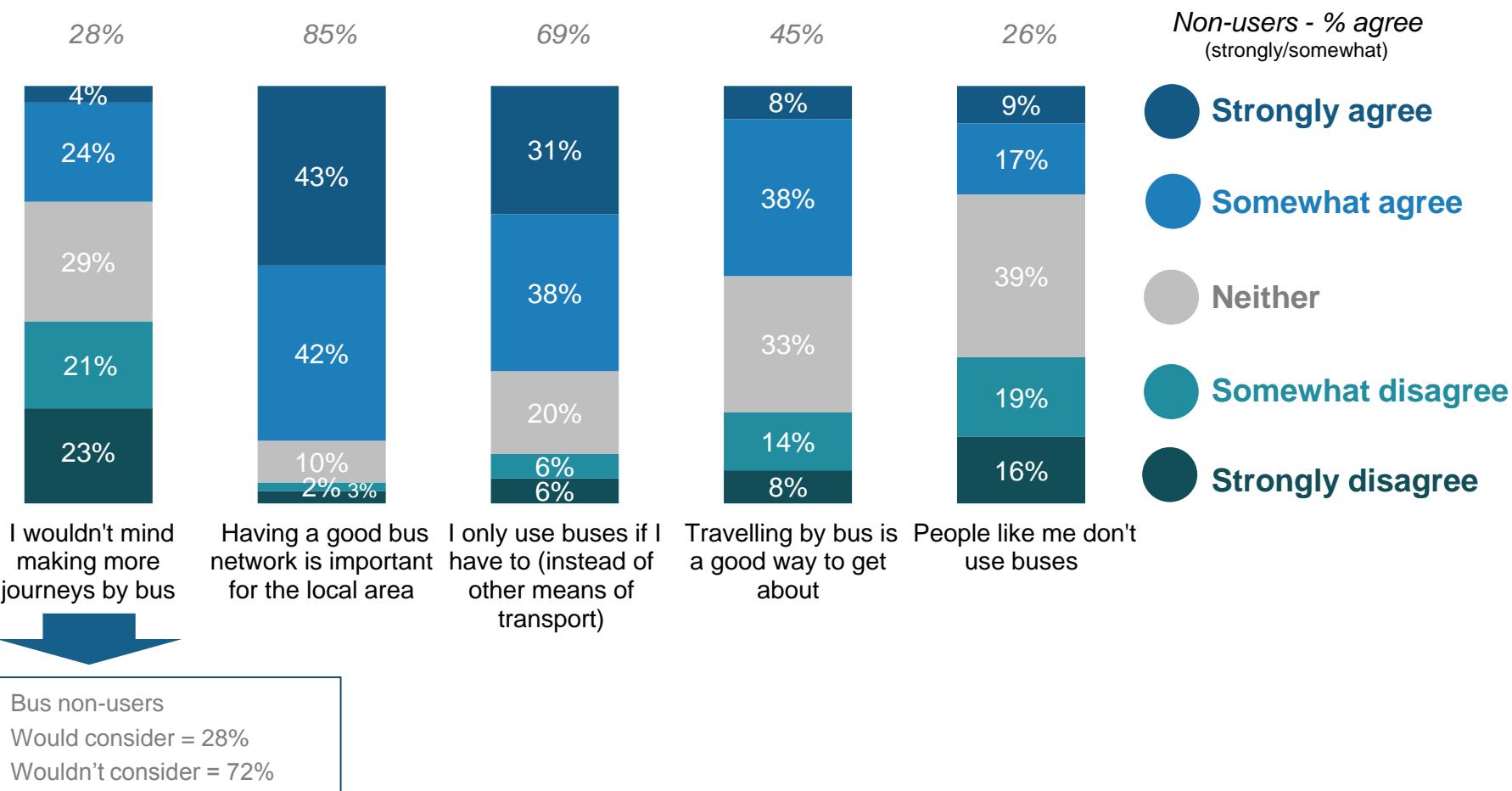


Q14. To what extent do you agree or disagree with each of the following statements about travelling by bus?

Base: all bus users n=4,664

Around a quarter of non-users wouldn't mind making more trips by bus. Only a quarter say buses are 'not for people like me'.

Per cent agree with statement: all non-users



Q14. To what extent do you agree or disagree with each of the following statements about travelling by bus?
Base: all Non users England n = 2382



Among users, very similar priorities between those open/not open to using buses more often

Priorities by bus users open to using buses more

	Overall	Consider	Not consider	
Better value for money from bus journeys	258	1	249	1
More buses arriving on time at your bus stop	247	2	245	2
More journeys on buses running to time	228	3	225	3
Buses running more often than they do now	224	4	217	4
More effort made to tackle any anti-social behaviour	174	5	172	5
Buses going to more places you want to go	158	6	155	6
More bus stops with next bus displays	121	7	131	7
Being given more/better information when delays occur on journeys	110	8	113	8
Cleaner and better maintained buses	107	9	108	9
Tickets which better allow travel on all local bus companies	107	10	105	11
Better security at bus stops so people feel safer waiting for buses	104	11	104	12
Drivers allowing more time for passengers to get to their seats	103	12	107	10
Better quality information at bus stops	87	13	93	13
Drivers showing more consideration to passengers	86	14	89	14
A smoother ride with less sudden braking or jolting	86	15	88	15
A more suitable range of tickets for how and when you use buses	78	16	77	17
More buses having next stop announcements/displays	74	17	80	16
More personal space on buses (whether seated or standing)	74	18	73	18
Free wi-fi being more widely available	72	19	66	20
Seats being more comfortable	69	20	68	19
Shorter journey times on buses	66	21	63	21
More seating being made available	61	22	61	23
Improved ventilation and temperature control	61	23	62	22
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	52	25
Improved display of route numbers / destinations on outside of buses	52	25	53	24
Drivers communicating better with passengers	50	26	52	26
Improved information via apps/online on bus arrival/running times	48	27	47	28
Making it easier to step on and off buses	46	28	48	27
More space for wheelchairs and buggies	44	29	45	29
Better maintained bus stops	29	30	29	30
Being able to buy tickets from more places	23	31	23	31

**Consider using buses more
54% of Bus users**

Agree that they wouldn't mind making more journeys by bus

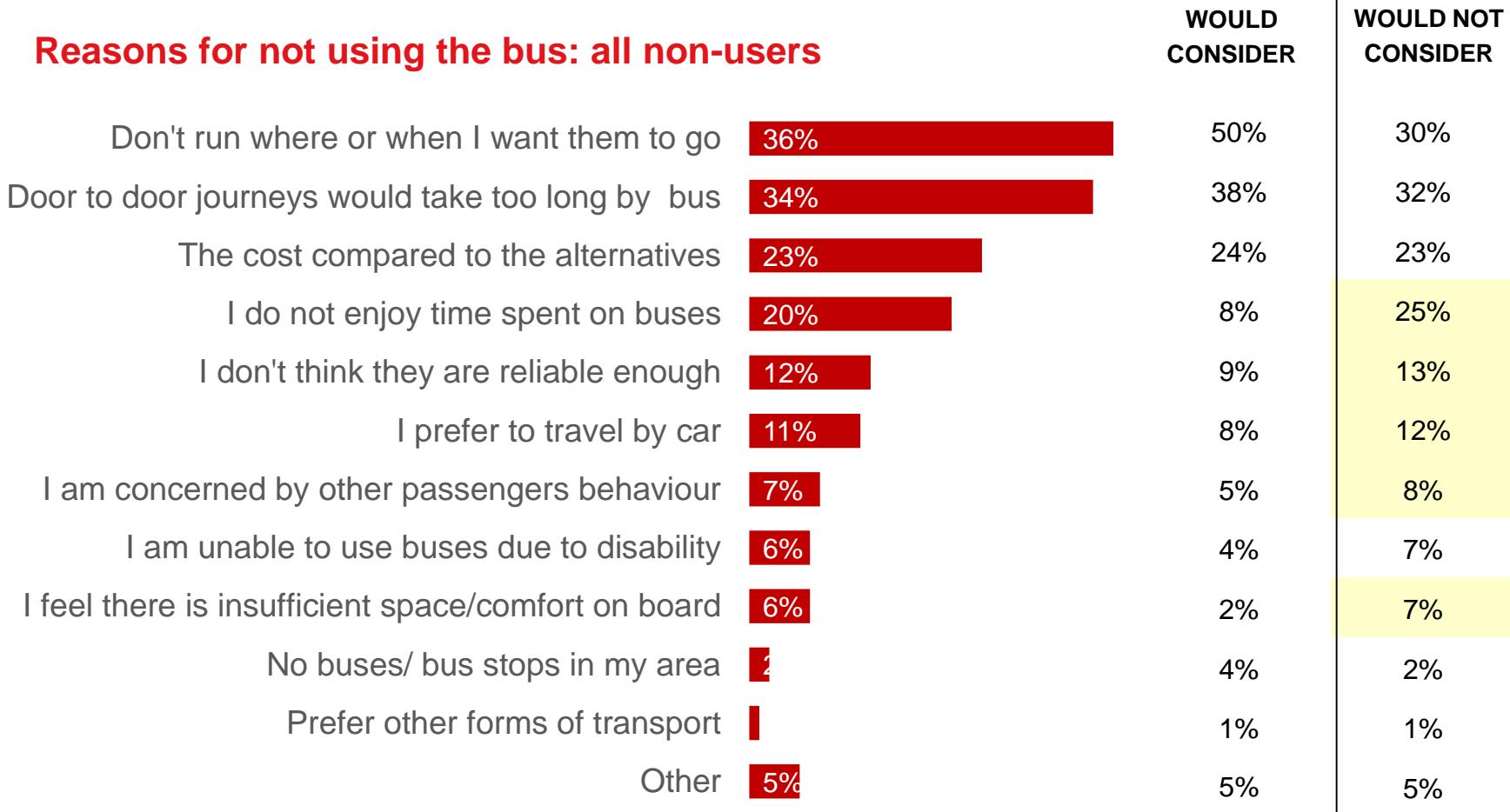


Main reasons for non-use is they don't run where needed and that door to door journeys take too long

Whilst those open and not open to making more journeys both cite the above reasons most, those not open to making more journeys cite on - bus experience factors as higher secondary reasons.



Reasons for not using the bus: all non-users

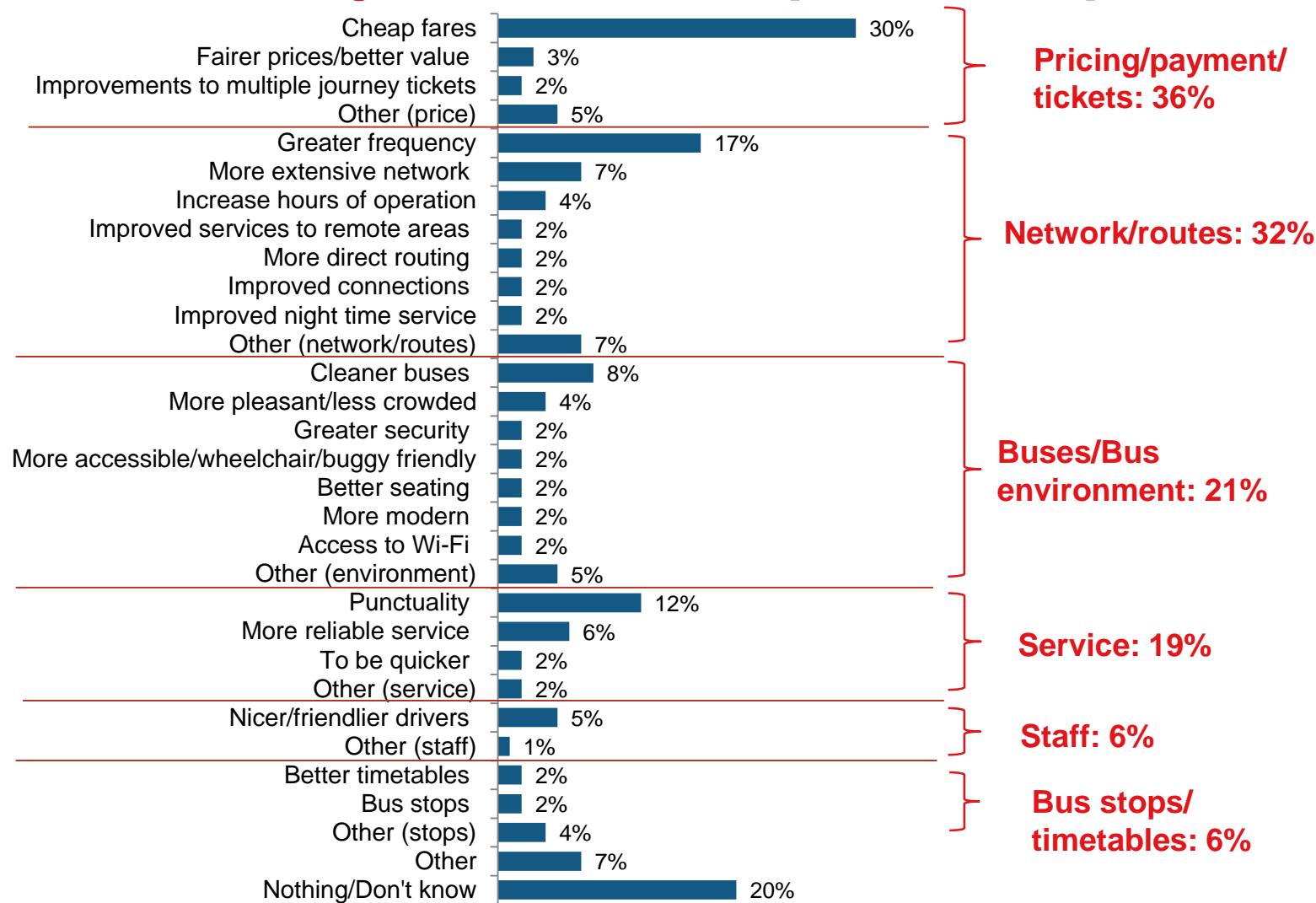


Q9. What are your top TWO reasons for not using buses? Please select up to 2 answers.

Base: all non users n=2382; all non-users agree 'wouldn't mind making more journeys by bus' n = 671 disagree n = 1711

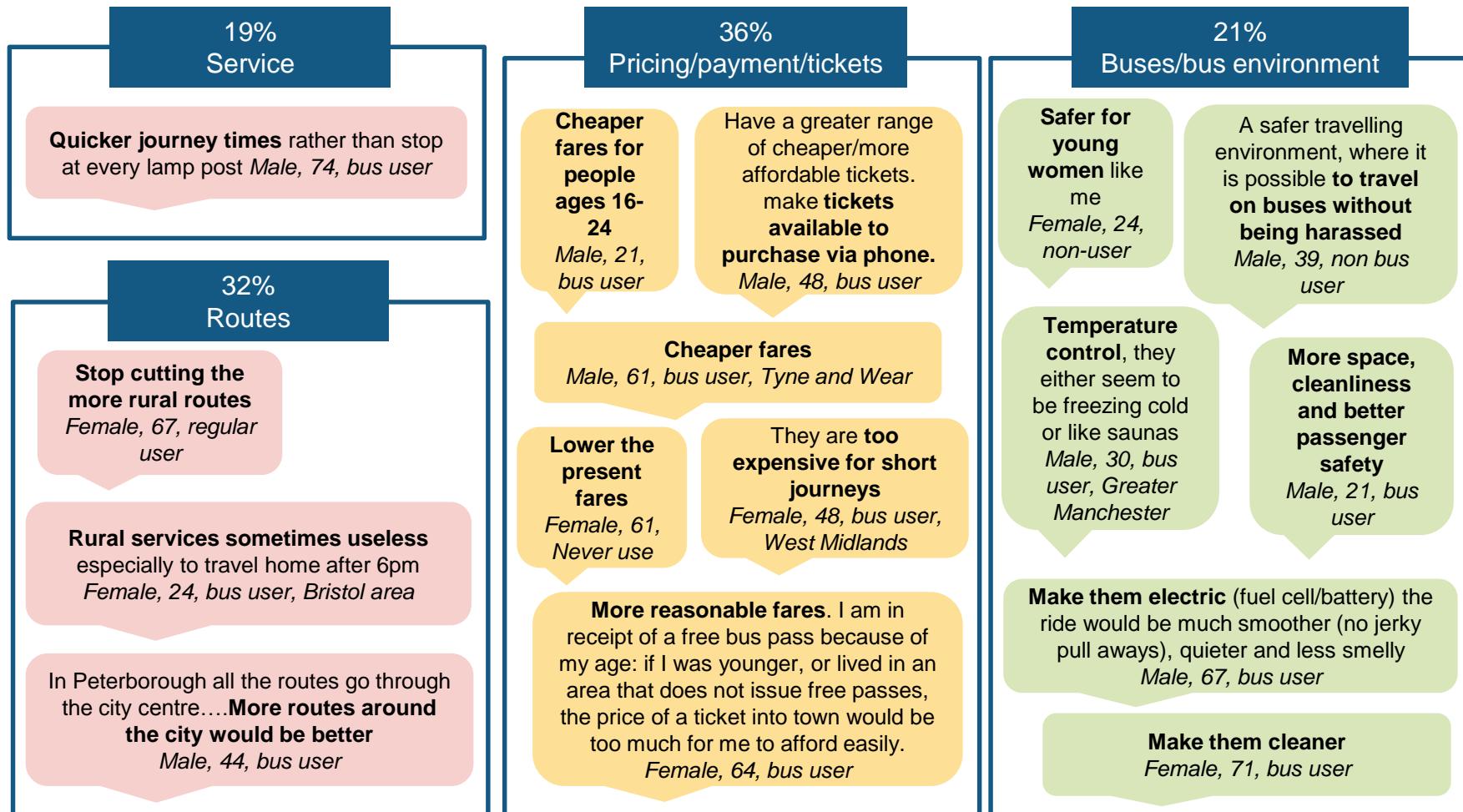
Top of mind improvements to encourage bus use focus on improving the basics: frequency, punctuality and price

Top of mind how to encourage bus use: all bus users [coded verbatims]



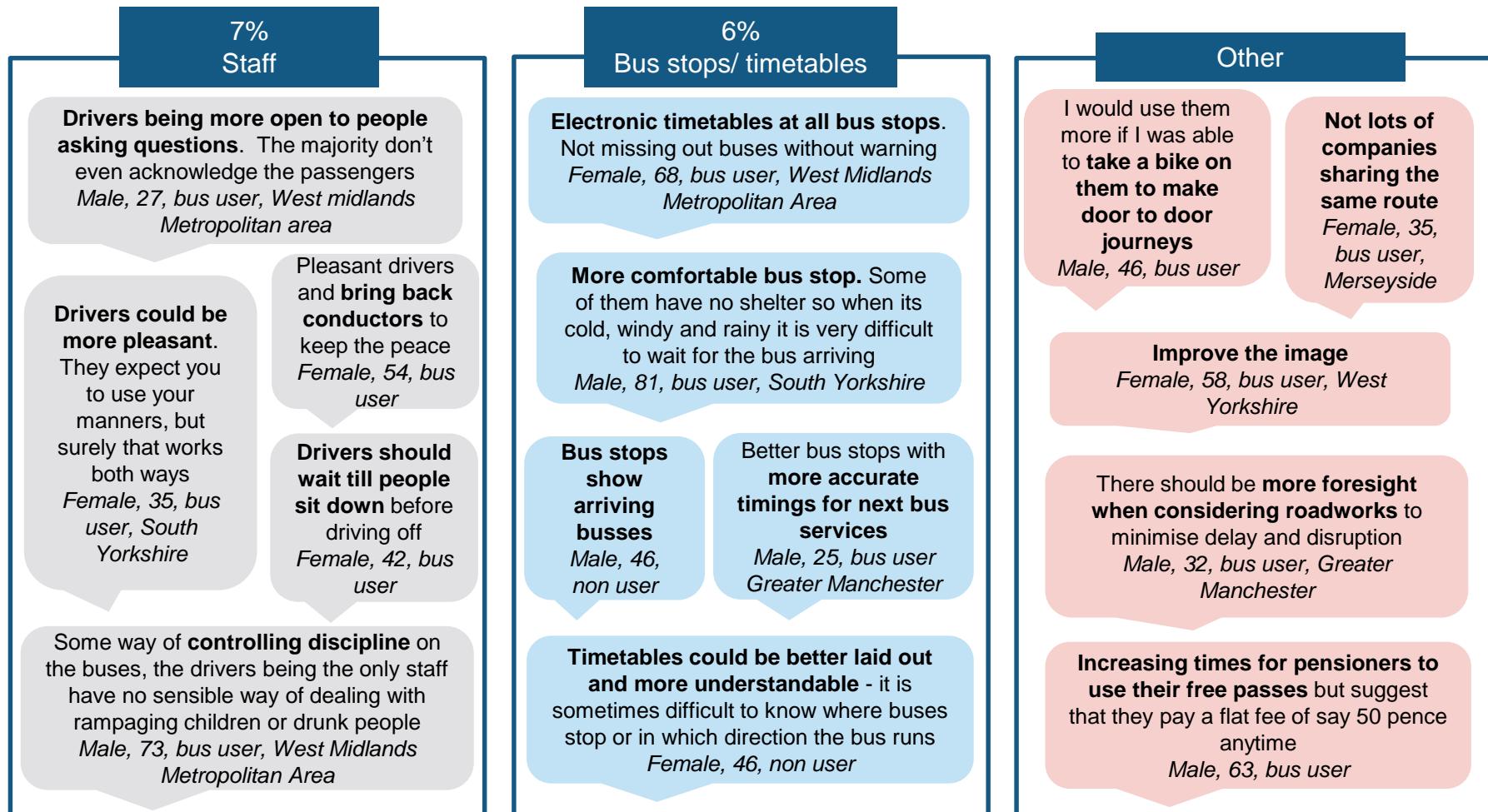
Three broad themes emerge for improvements to encourage bus use

Top of mind how to encourage bus use: verbatim comments



Secondary themes for improvement are around stops/timetables and staff

Top of mind how to encourage bus use: verbatim comments



Q16. What improvements should be made to buses to encourage more people to use them?

Base: all bus users n = 4664

Appendix

Bus users profile by PTE

Profile of bus users: by PTE

	Bus users	Merseyside	Greater Manchester	South Yorkshire	Tyne and Wear	West Midlands	West Yorkshire	Bristol	Non-PTE users	Non-users
Base Sizes	n=4,664	n=435	n=441	n=436	n=437	n=436	n=438	n=437	n=1,604	n=2,382
Gender										
Male	49%	60%	57%	47%	50%	51%	48%	55%	46%	46%
Female	51%	40%	43%	53%	50%	49%	52%	45%	54%	54%
Age										
16-34	29%	41%	39%	38%	33%	35%	33%	35%	22%	22%
35-54	33%	35%	35%	43%	36%	38%	35%	31%	37%	41%
55 +	38%	24%	27%	19%	31%	27%	33%	34%	41%	38%
Social Grade										
ABC1	55%	65%	57%	51%	49%	57%	63%	69%	54%	54%
C2DE	45%	35%	43%	49%	51%	43%	37%	31%	46%	46%
Household Income										
Up to £21,000	36%	36%	34%	37%	31%	33%	34%	23%	35%	32%
£21,000 to £34,000	27%	26%	26%	27%	30%	26%	21%	27%	27%	27%
£34,001 to £55,000	20%	21%	22%	19%	18%	23%	23%	19%	20%	21%
£55,000 or more	7%	9%	9%	7%	10%	9%	9%	17%	7%	8%
Prefer not to say	11%	8%	9%	10%	11%	9%	13%	14%	11%	12%
Disability										
No: None	72%	76%	74%	75%	72%	75%	78%	77%	69%	69%
NET: Yes	24%	20%	22%	20%	25%	20%	17%	19%	28%	28%
Prefer not to say	4%	4%	5%	5%	3%	5%	5%	4%	3%	3%
Access to vehicle										
NET: Any availability	78%	72%	78%	80%	82%	79%	81%	81%	88%	95%
Rarely, or never have access	22%	28%	22%	20%	18%	21%	19%	19%	12%	5%

Bus user profile by frequency of using bus

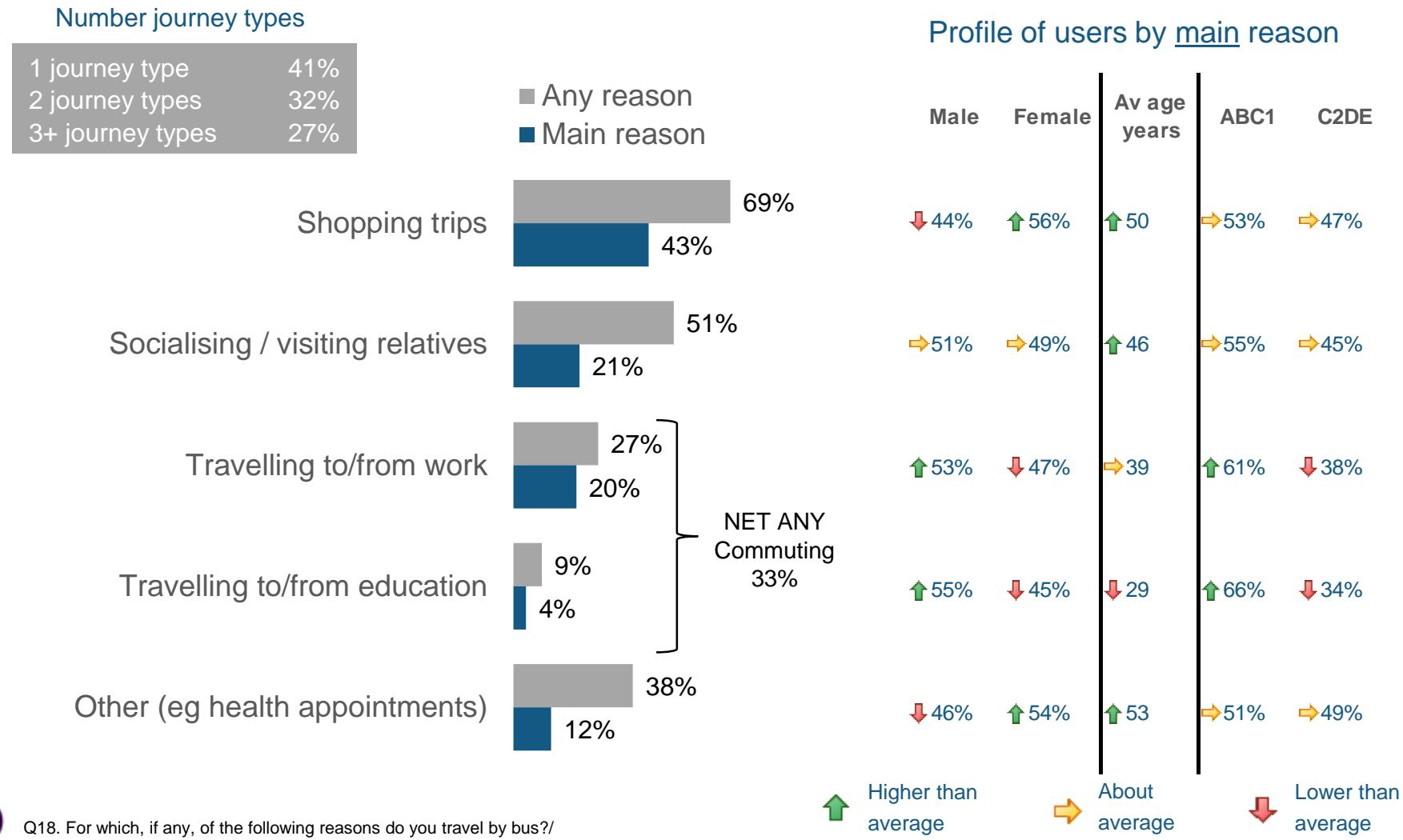
Profile of all bus users

	Daily	Travel Weekly	Travel monthly	Travel at least once every 3 months	Travel less frequently than every 3 months	Never Travel on buses
<i>Base Sizes</i>	<i>n=489</i>	<i>n=1,988</i>	<i>n=1,315</i>	<i>n=872</i>	<i>n=1,592</i>	<i>n=790</i>
Gender						
Male	51%	49%	50%	48%	46%	46%
Female	49%	51%	50%	52%	54%	54%
Age						
16-34	48%	29%	25%	24%	21%	23%
35-54	37%	32%	30%	38%	41%	41%
55 +	15%	40%	44%	38%	38%	36%
ABC1	57%	53%	56%	58%	58%	48%
C2DE	43%	47%	44%	42%	42%	52%
Household Income						
Up to £21,000	39%	40%	33%	30%	30%	37%
£21,000 to £34,000	28%	25%	27%	28%	27%	26%
£34,001 to £55,000	17%	18%	22%	22%	22%	20%
£55,000 or more	5%	7%	6%	8%	10%	6%
Prefer not to say	11%	10%	11%	12%	11%	12%
Disability						
No: None	78%	70%	71%	75%	72%	63%
NET: Yes	19%	25%	25%	22%	26%	34%
Prefer not to say	3%	5%	4%	3%	2%	3%
Access to vehicle						
NET: Any availability	52%	75%	85%	91%	95%	96%
Rarely, or never have access	48%	25%	15%	9%	5%	4%



The main journey purpose for bus users is for shopping trips, followed by social trips. One in four mainly use buses to commute

Reasons for bus travel (journey purpose): all bus users



Q18. For which, if any, of the following reasons do you travel by bus?/

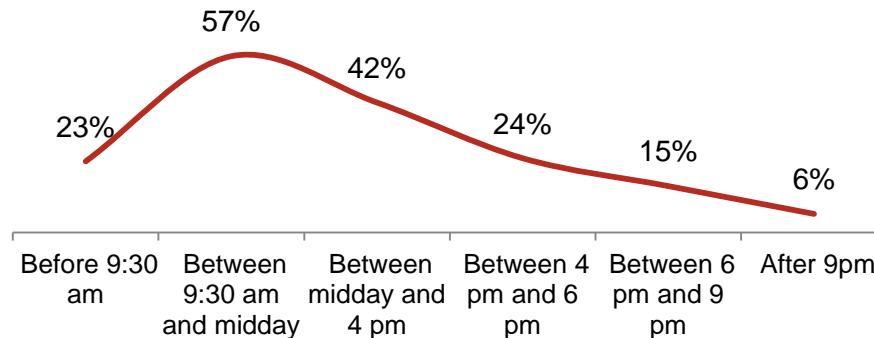
Q19. For which type of journey do you mainly use the bus?

Base: all bus users n=4,664

Bus travel peaks late morning; typical trip takes around 20 minutes. Most use paper tickets; a third travel with a free pass

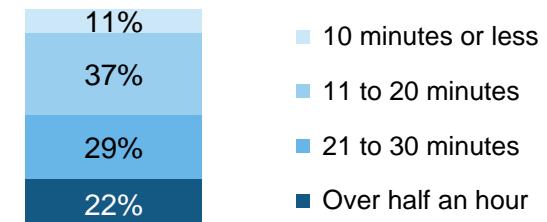
Travel profile for main bus use reason: all bus users

Times during the day travelled for main bus use reason

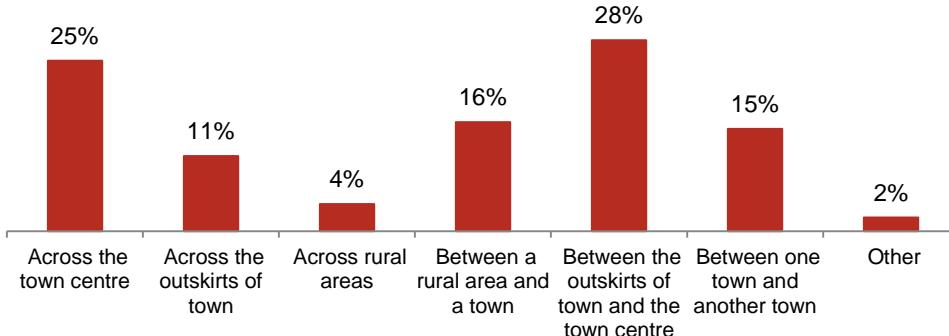


Typical length of journey

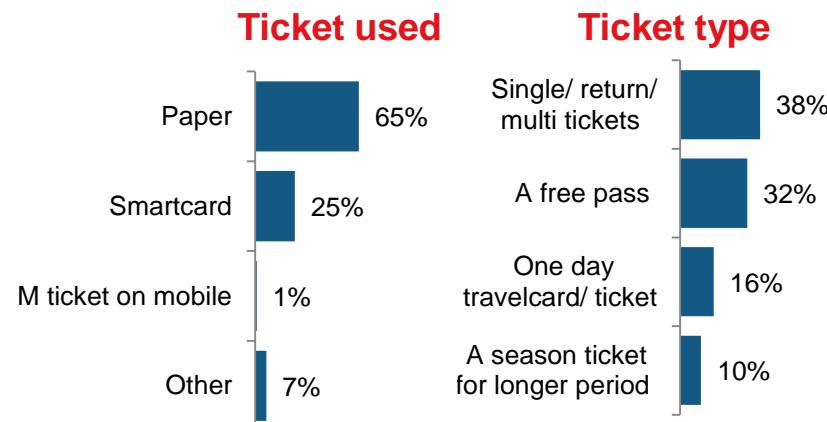
About 20 mins



Type of area travelled across for main bus use reason



Typical ticketing behaviour

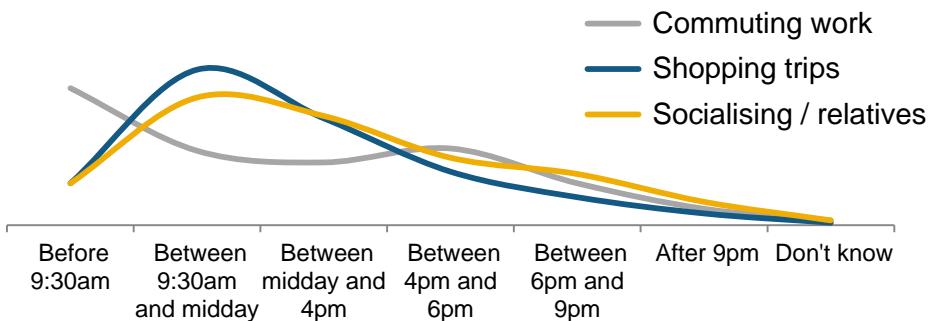


Q20. When you use the bus for [main purpose] is this mostly to travel ... Q21. When you travel by bus for [main purpose], typically how long is the time you spend on the bus for that journey? Q22. When you travel by bus for [main purpose], what type of ticket do you typically use? Q23. In what form is that ticket? Q24. And at what times of day do you travel by bus for [main reason]?
Base: all bus users n=4,664

Commuters display a different travel pattern: more likely travelling early morning; across the town centre and with a season ticket

Travel profile for main bus trip: all bus users

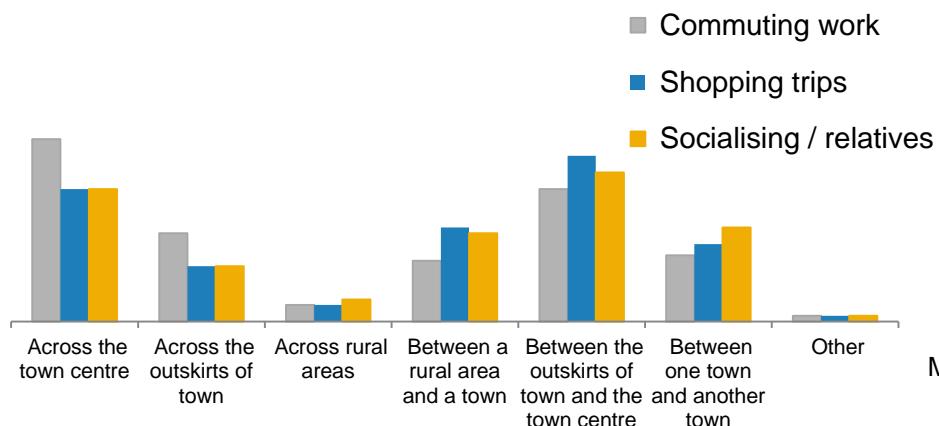
Typical time of day travelled - by trip type



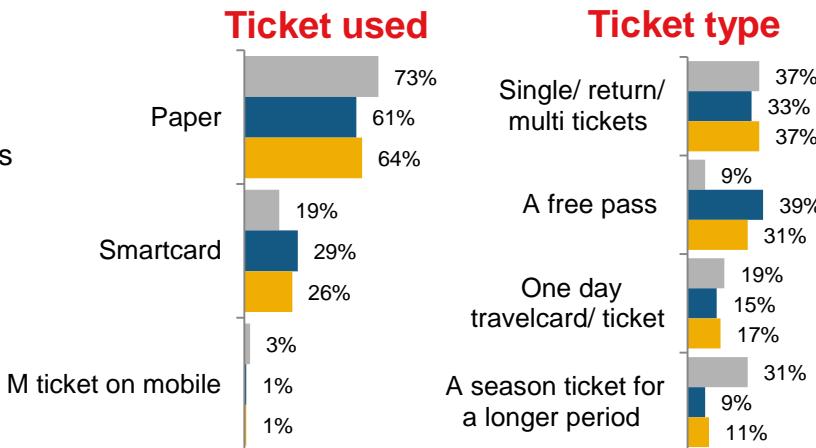
Typical length of journey - by trip type

	Up to 10 min	11 to 20 min	21 to 30 min	Over 30 min
Commuting	12	34	30	24
Shopping	13	43	27	16
Socialising	6	35	30	29

Typical route taken – by trip type



Typical ticketing behaviour – by trip type



Q20. When you use the bus for [main purpose] is this mostly to travel ... Q21. When you travel by bus for [main purpose], typically how long is the time you spend on the bus for that journey? Q22. When you travel by bus for [main purpose], what type of ticket do you typically use? Q23. In what form is that ticket? Q24. And at what times of day do you travel by bus for [main reason]?
Base: All bus users n=4,664

Priorities to improve – statistically tested with Max-Diff

What is Max-Diff: Maximum Difference Scaling (MaxDiff) is a way of evaluating the importance (or preference) of a number of alternatives. It is a discrete choice technique: respondents are asked to make simple best/worst choices.

How does Max-Diff work? Respondents complete a series of exercises (15 questions in this case). In each exercise they are presented with 5 items and asked to choose which are the most important and the least important to them.

Please tick the one improvement you would most like to see made, and the one you think is the least important to make.
Please select one only per column

	Most important	Least important
Cleaner and better maintained buses	<input type="radio"/>	<input type="radio"/>
Free wi-fi being more widely available	<input type="radio"/>	<input checked="" type="radio"/>
Better maintained bus stops	<input checked="" type="radio"/>	<input type="radio"/>
Drivers communicating better with passengers	<input type="radio"/>	<input type="radio"/>
More personal space on buses (whether seated or standing)	<input type="radio"/>	<input type="radio"/>

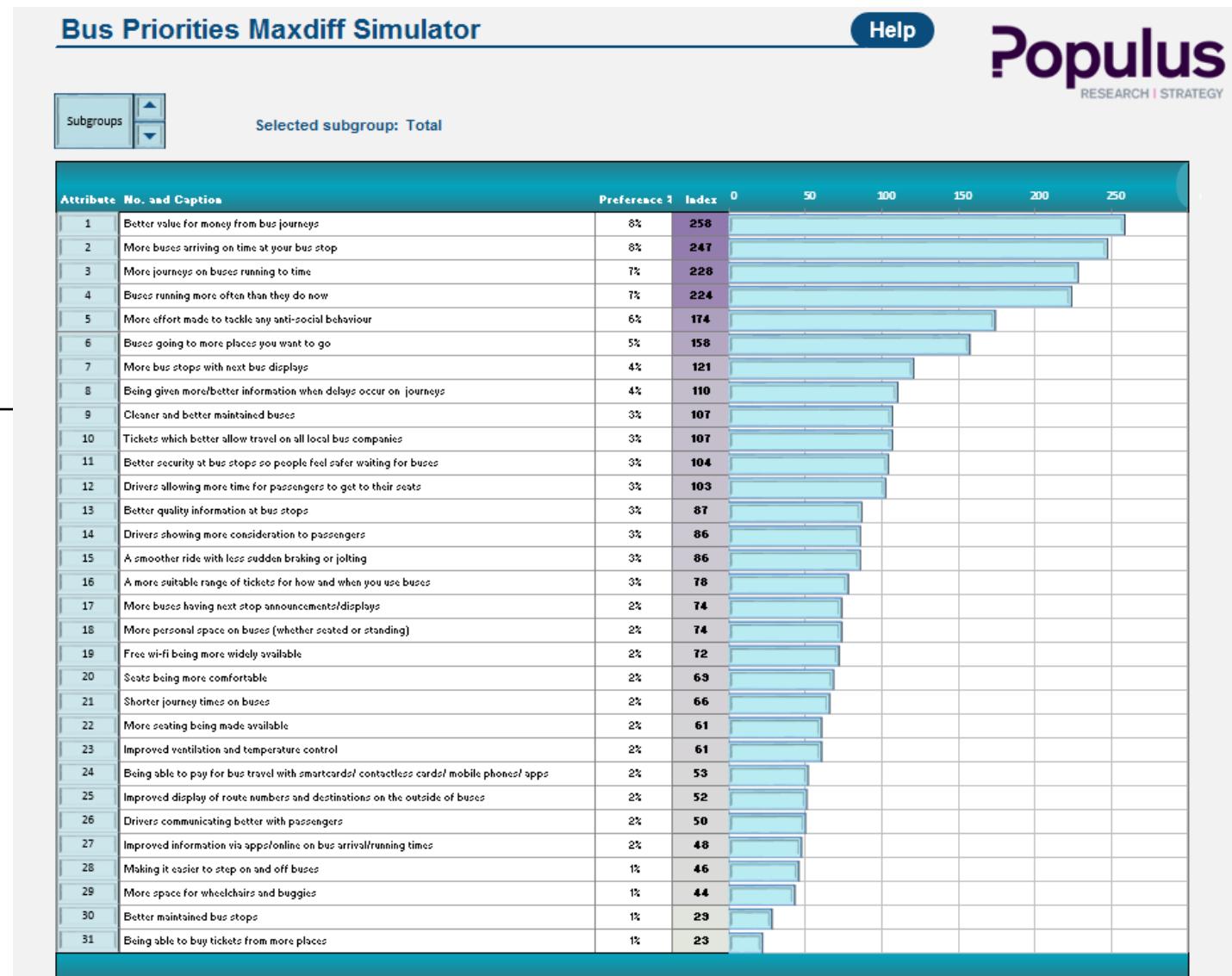
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Exercise repeated X16 covering all 31 possible priorities with 10 order variations

Priorities can be explored and tested further within an interactive simulator

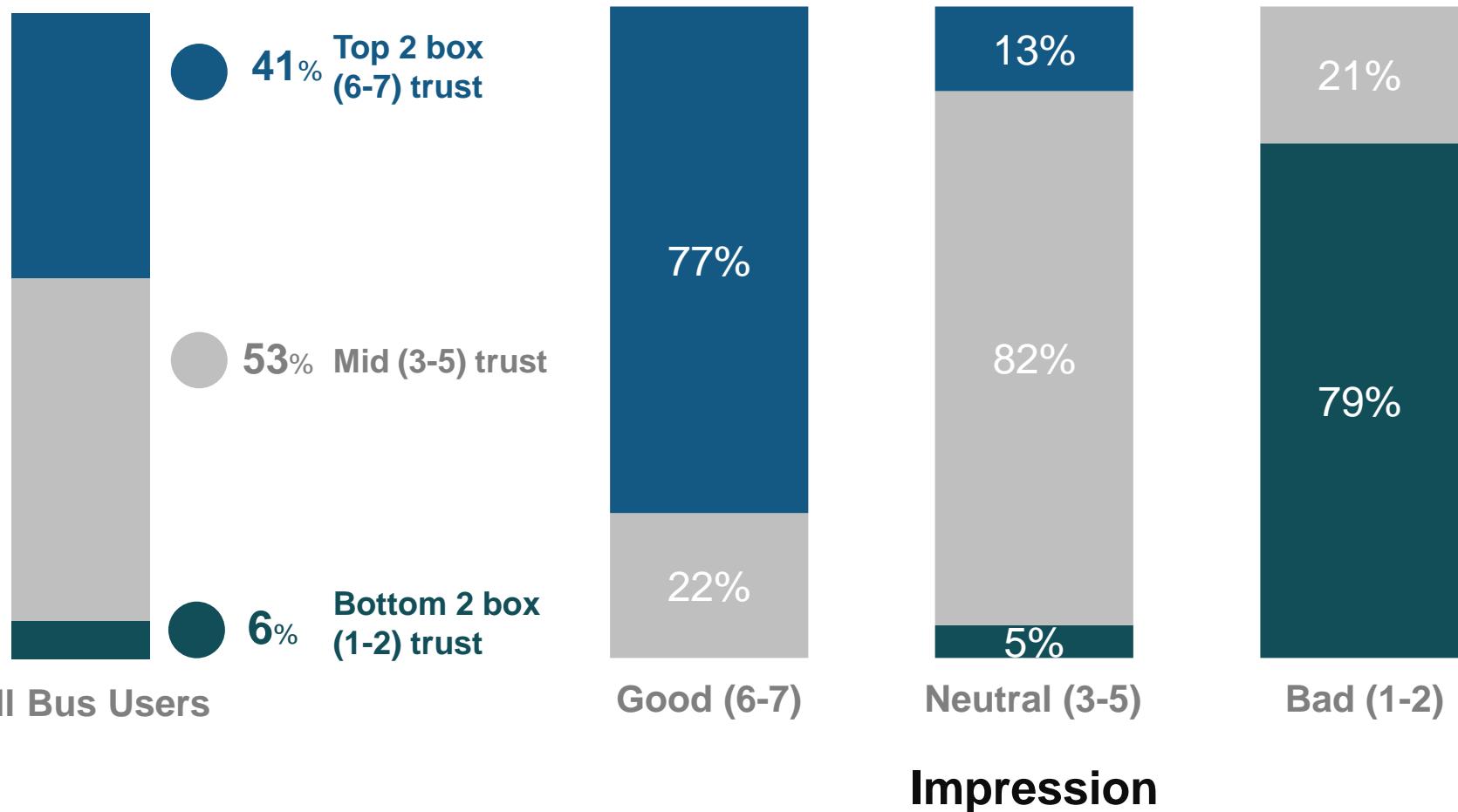
Run across pre
set sub groups

Switch priorities
on/off to test user
defined sets of
priorities



The relationship between the trust scale and the impression scale shows a high correlation

Level of trust with bus company mainly used: all bus users

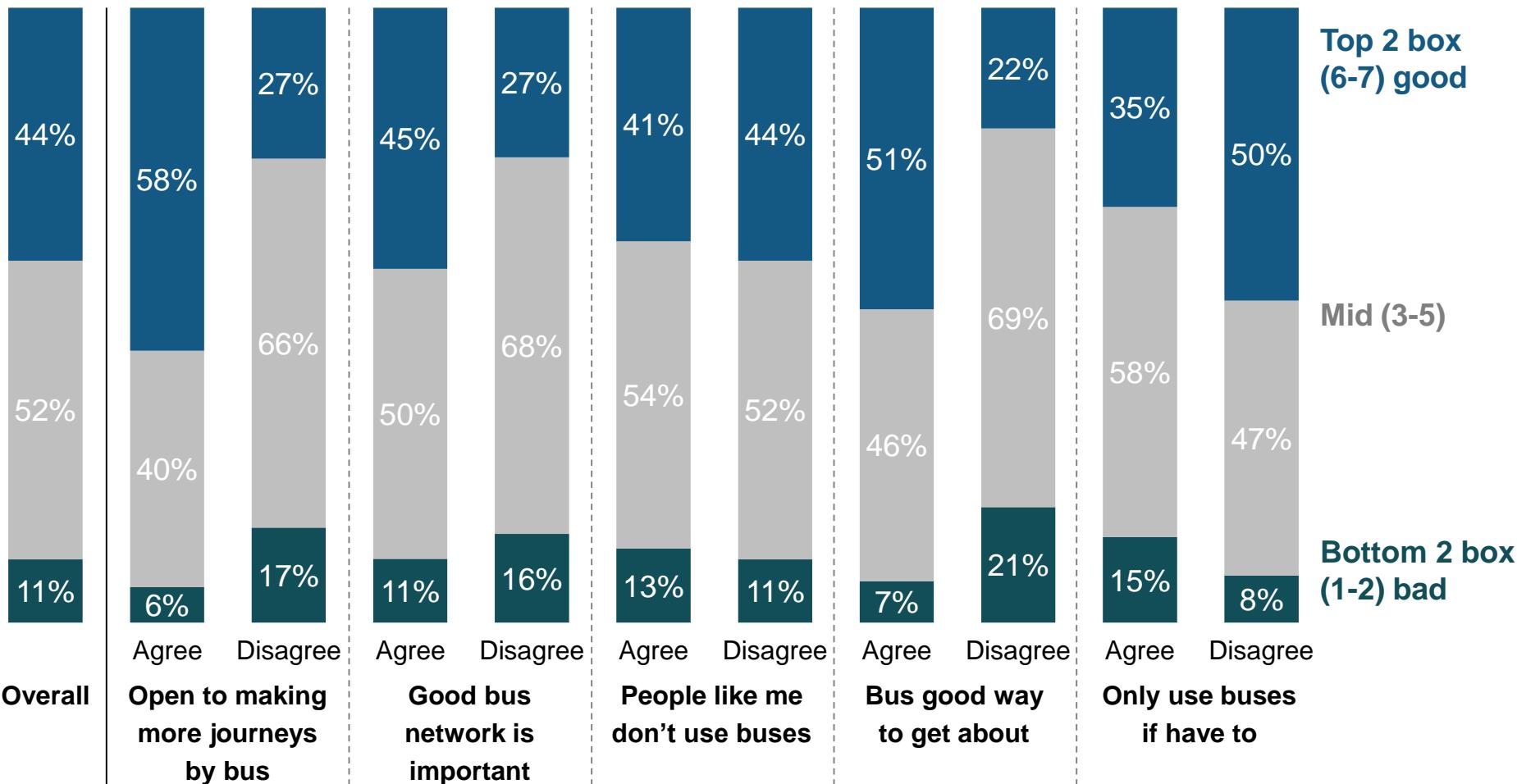


Q11. Having travelled with the bus company that runs most of the services you use, what's the overall impression you have of them?
Base: all bus users n=4,664



Those who are open to making more journeys by bus have the highest overall impression of their bus company

Overall impression of bus company mainly used: all bus users



Q11. Having travelled with the bus company that runs most of the services you use, what's the overall impression you have of them?

Base: all bus users n=4,664