

Bus passengers' trust and priorities for improvement

Prepared by Populus for Transport Focus

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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



PTE BOOST (Passenger Transport Executive)

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.

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

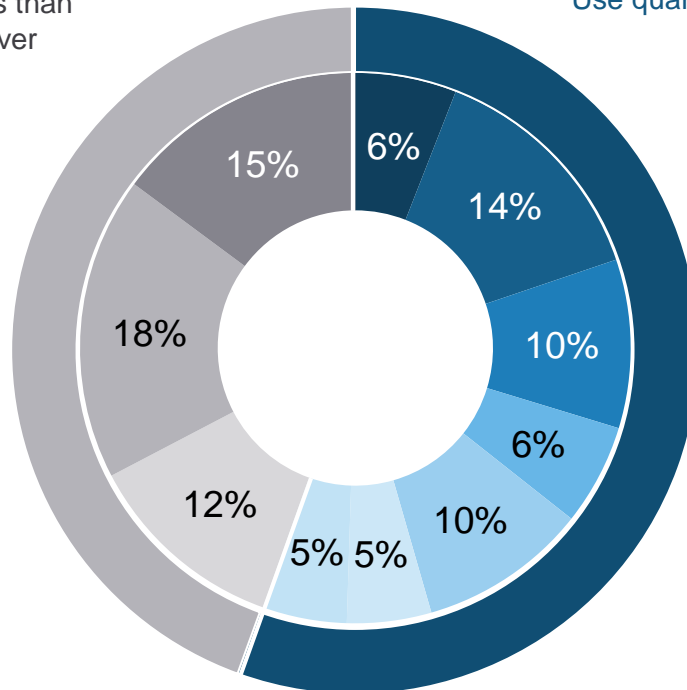
Bus usage: all respondents representative

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

■ Never

Weekly

Monthly

Once every few months

Less frequently

Profile of users across England outside London

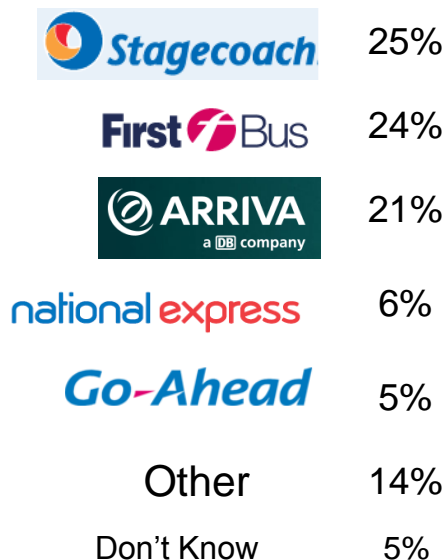
Overall population representative sample n= 7,081

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

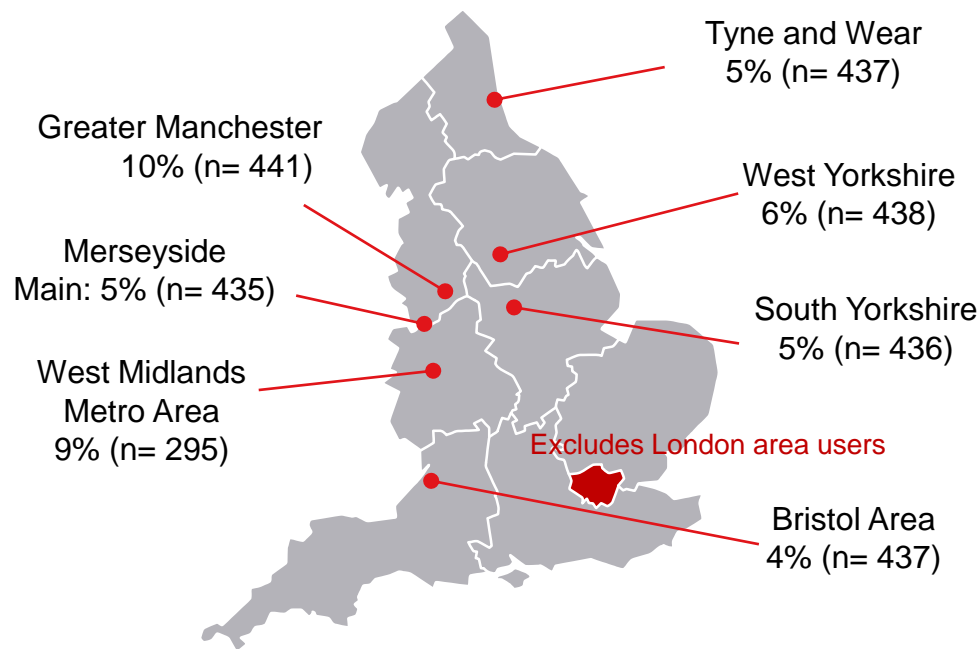
56% bus users:

Use quarterly or more frequently n= 4,664

Share of main bus use by bus company



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?

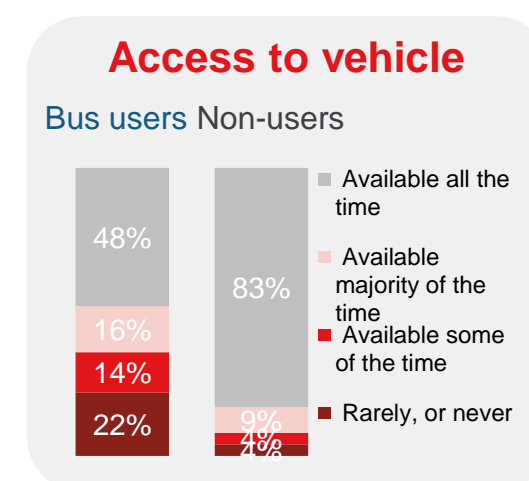
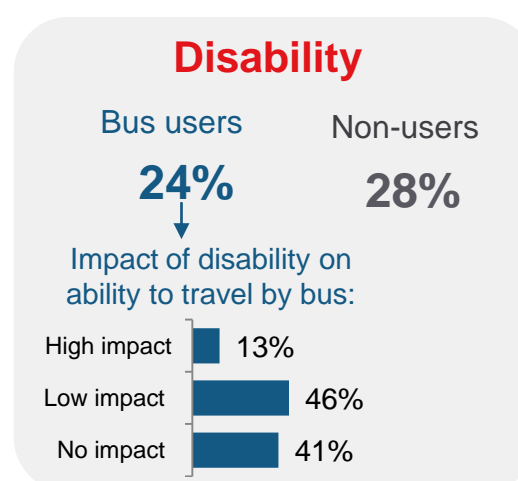
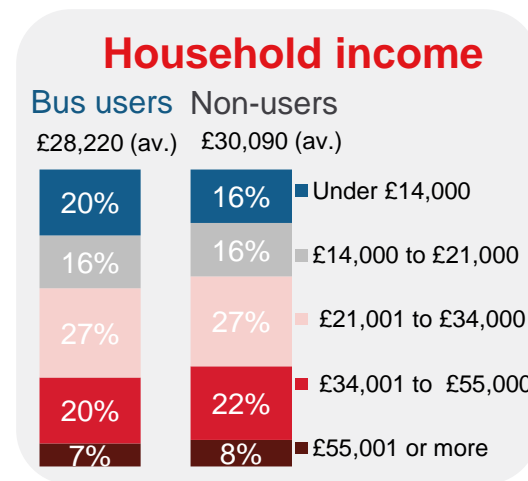
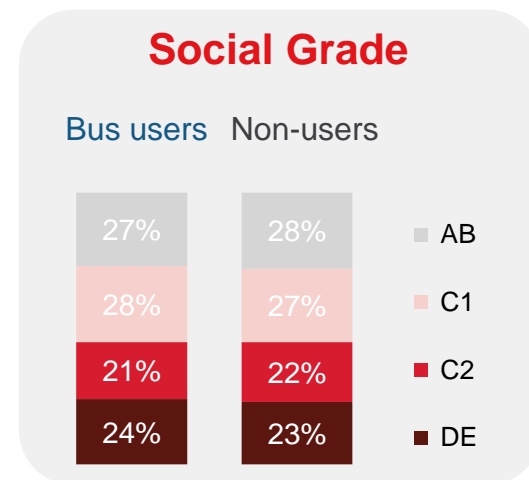
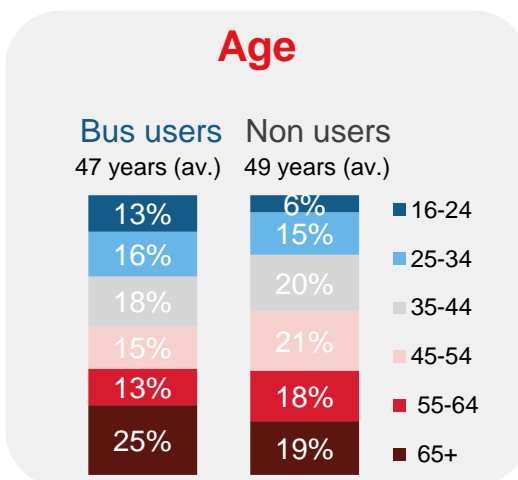
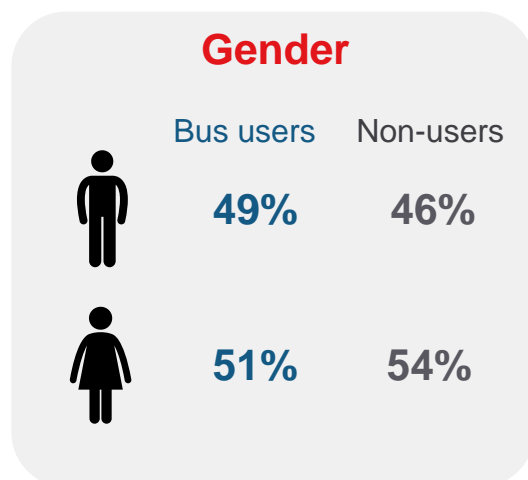
Q7. In which areas do you use the bus most often?

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

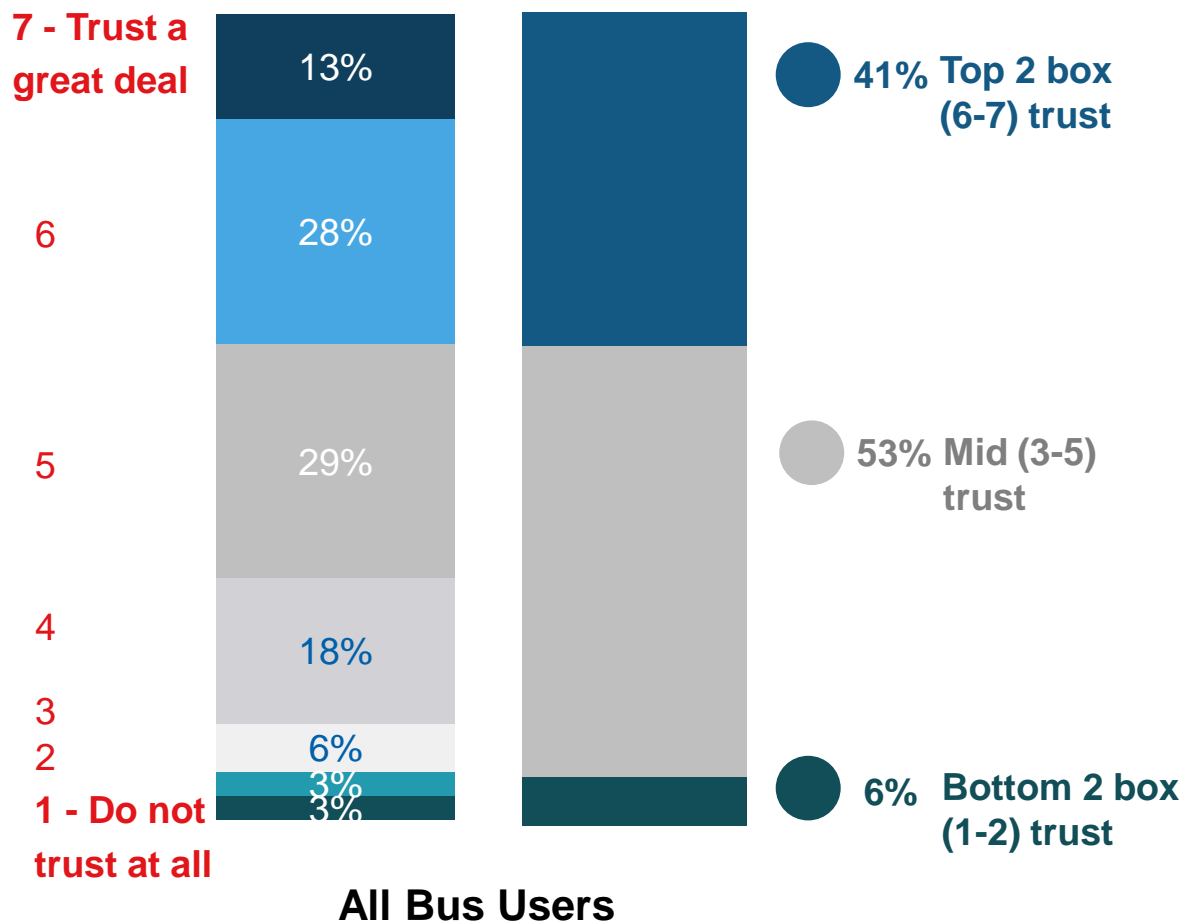
Profile of respondents: all bus users versus non bus users



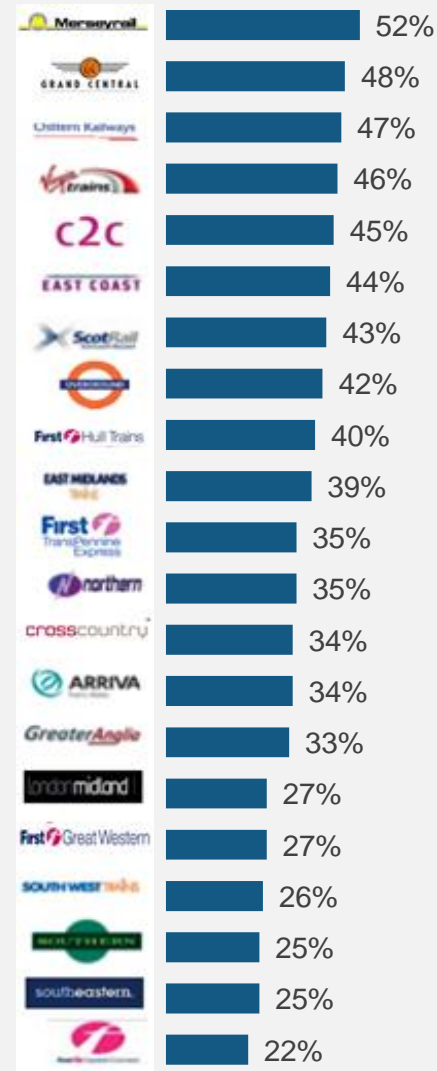
Attitudes and drivers of trust

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

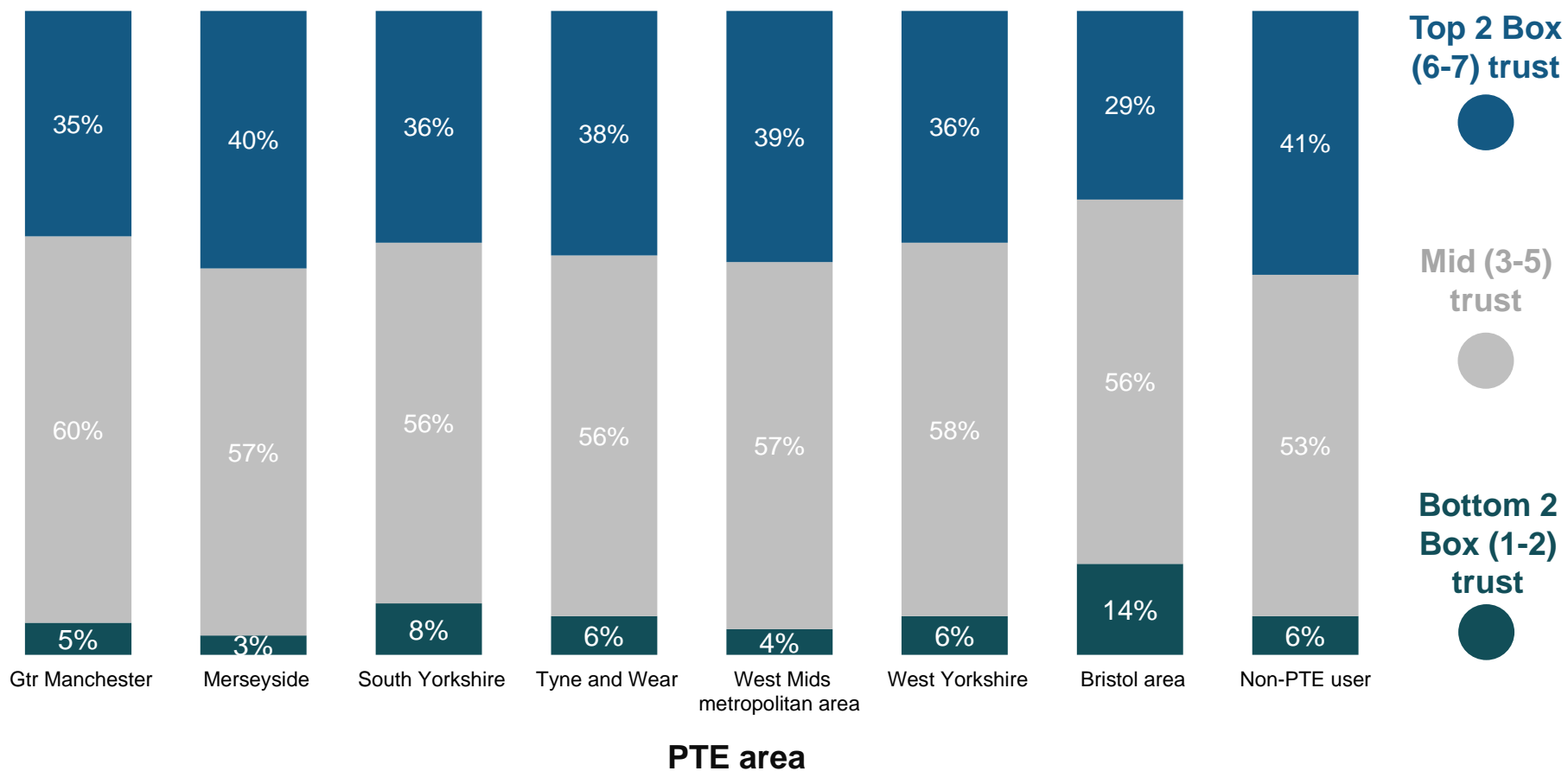


Rail Benchmark: Top 2 box (6-7) trust



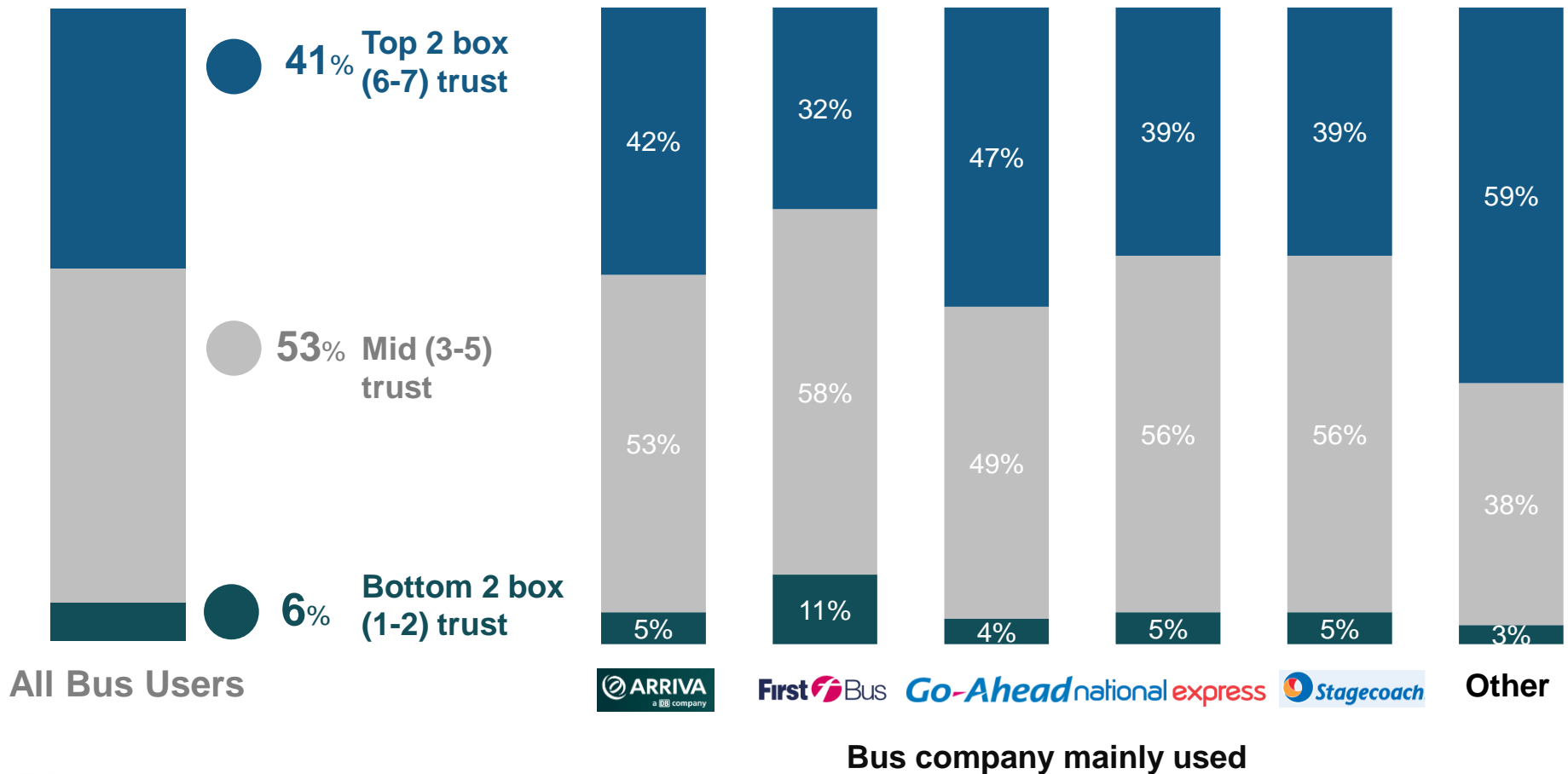
Trust varies across the PTEs

Level of trust by PTE area: all bus users



Trust varies across the major bus companies

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

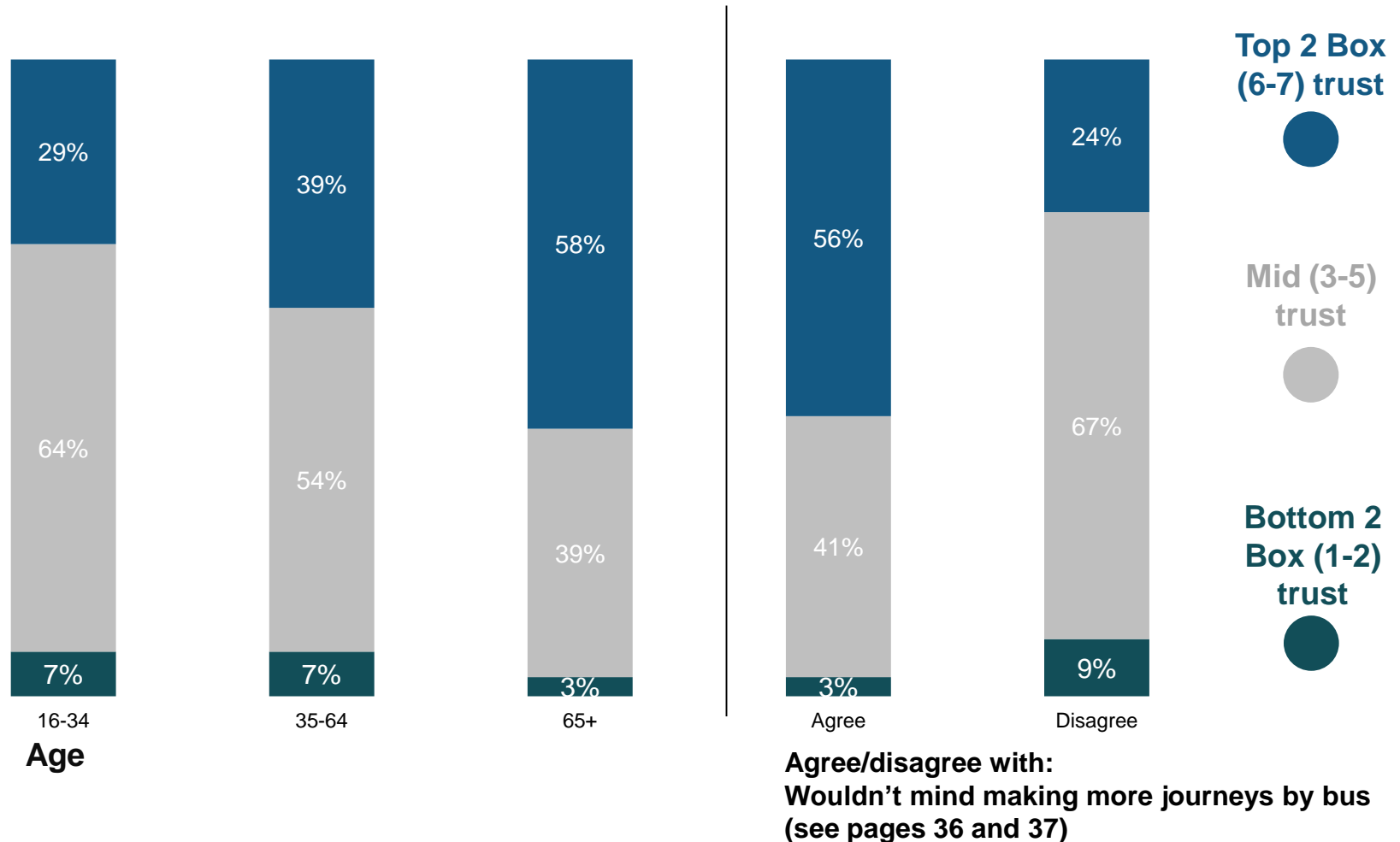


Q13. All things considered, how much do you trust the bus company that runs most of the services you use?

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?

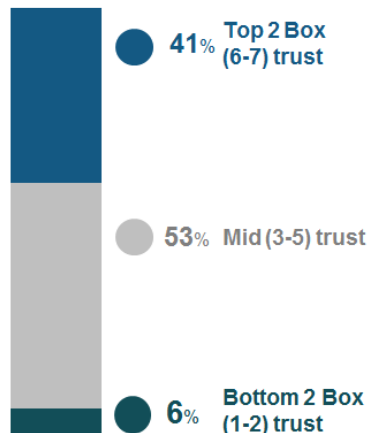
Base: age 16 to 34 = 930 ; 35 to 64 = 2411; age 65+ = 1323; agree 2577; disagree 2087 (includes neither/nor)

What drives trust in bus companies

3 stages to understanding what drives passenger trust of bus companies

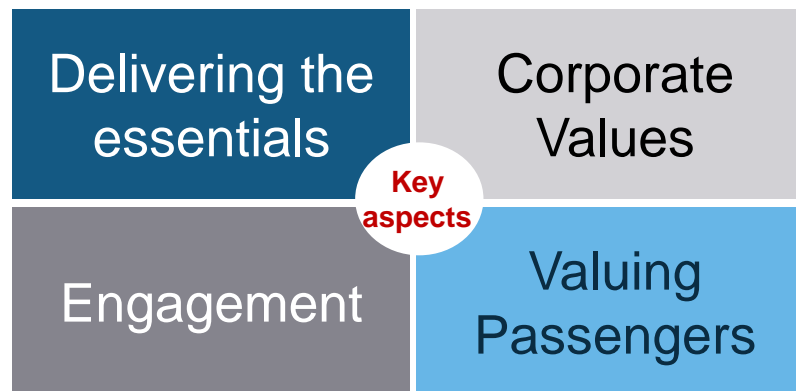
1

Measure overall trust



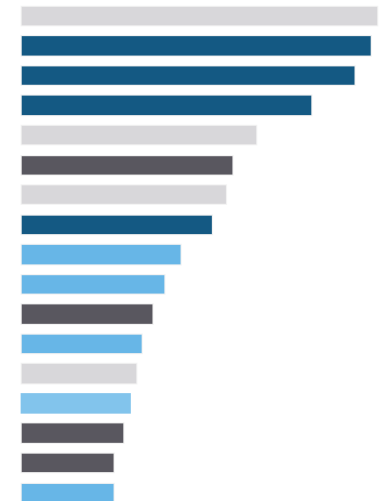
2

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%	

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%	✗

% agree bus company...

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%	✗

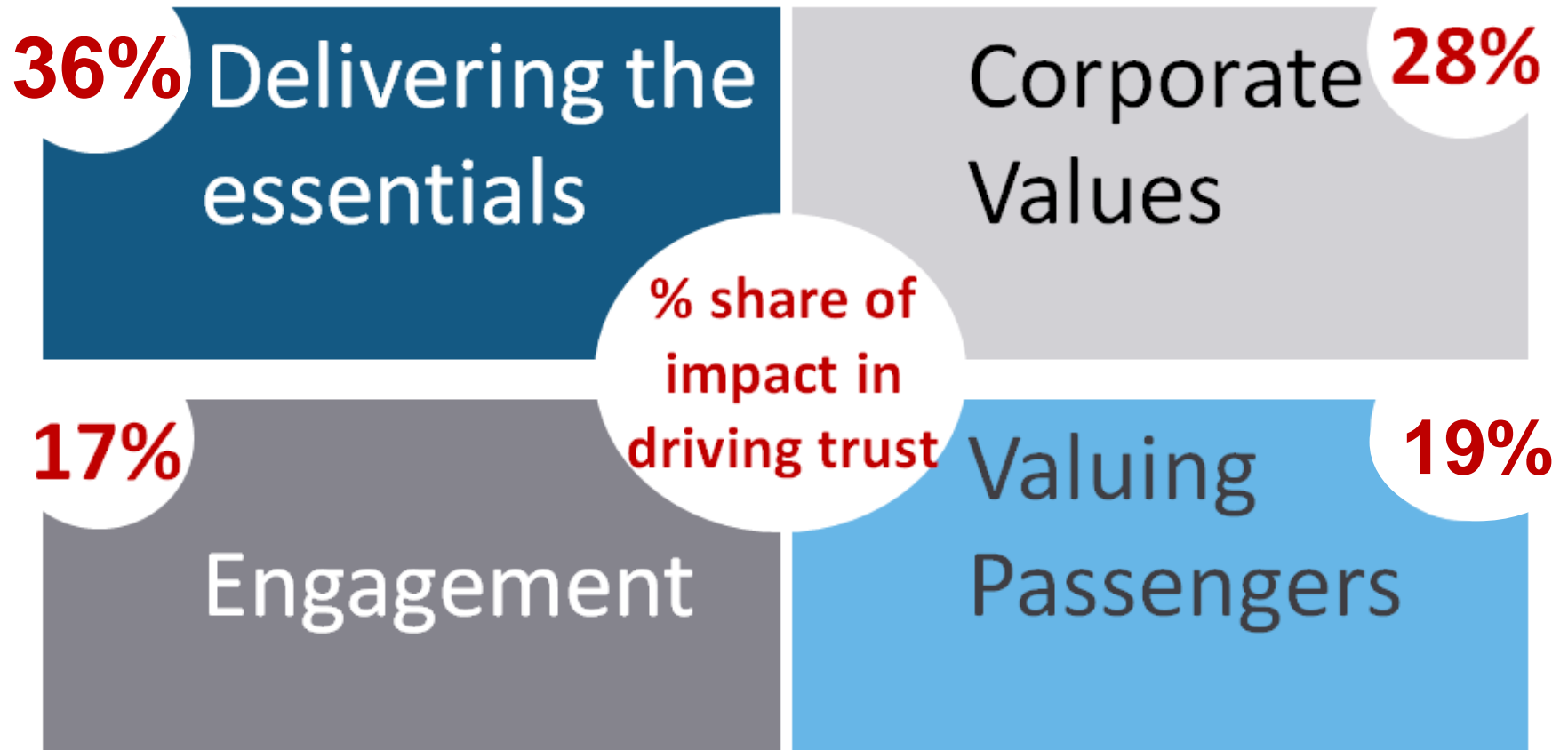
Average agreement level = 48%

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

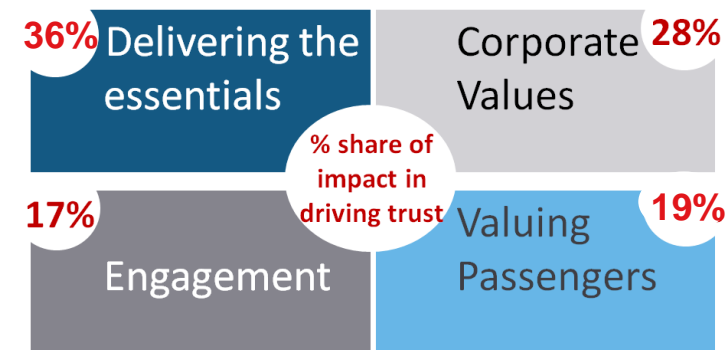
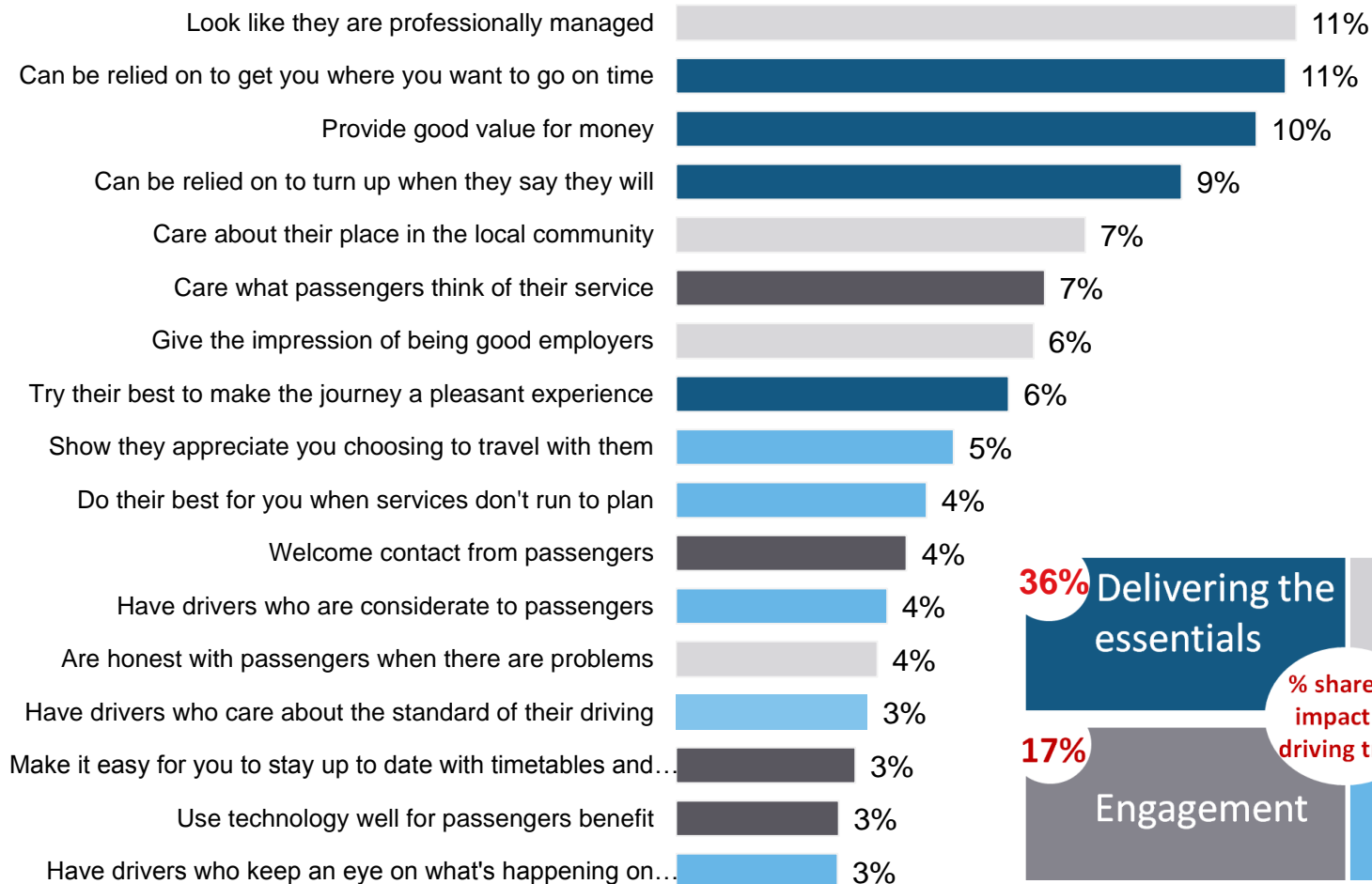
Delivering the essentials drives the highest share of trust, followed by corporate values

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



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



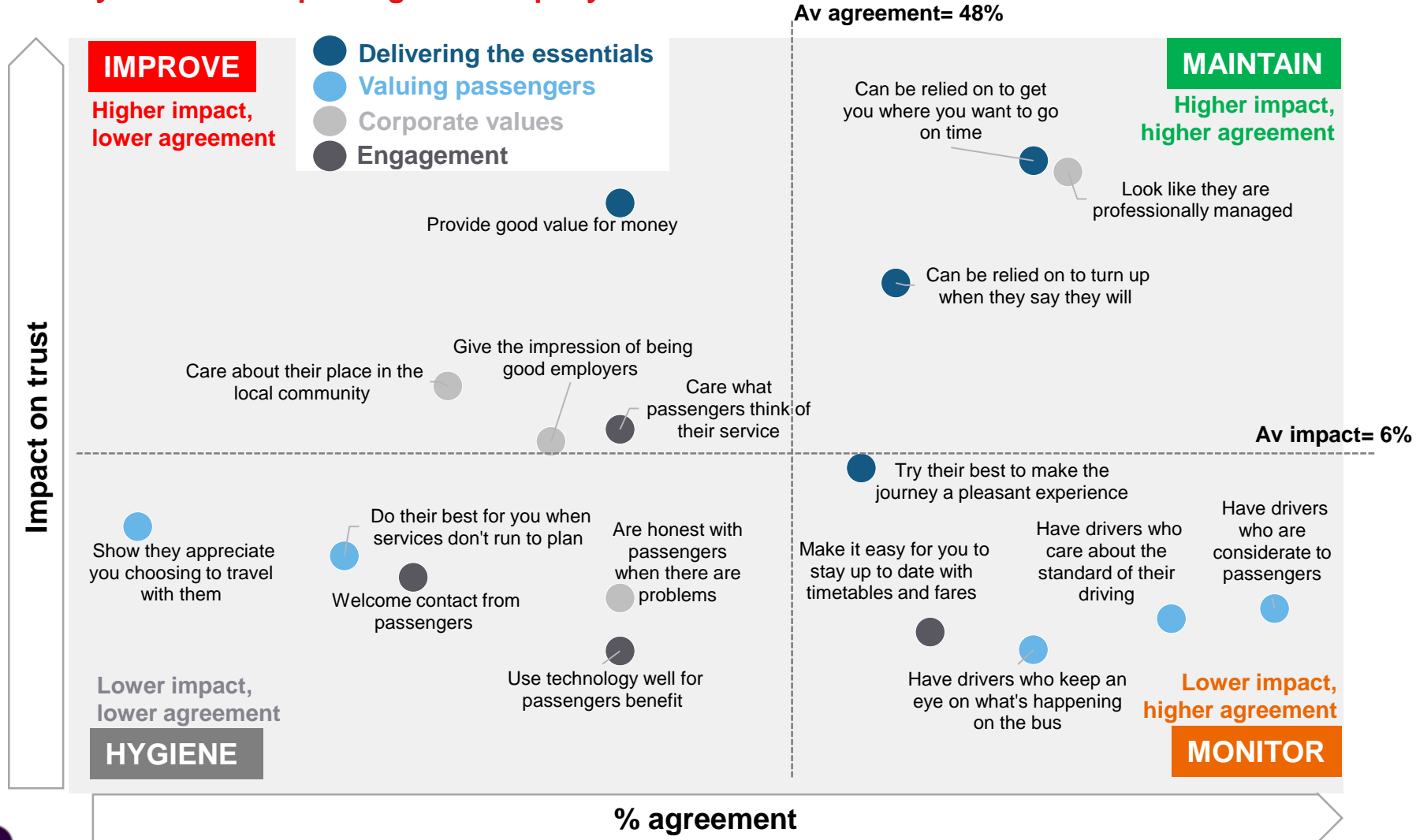
Q17. To what extent do you agree or disagree with each of the following statements?

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/Wear	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%

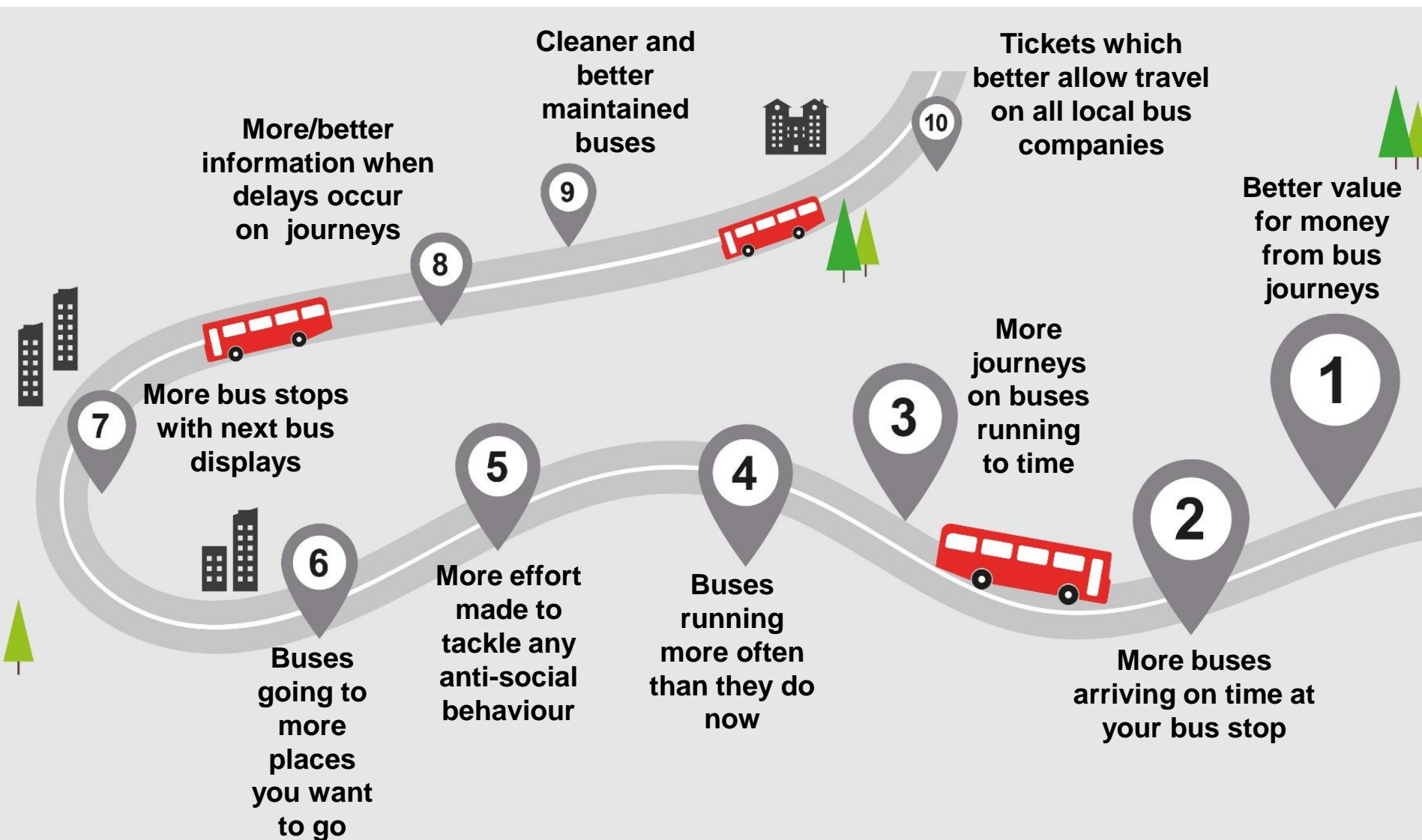
Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...

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

Passengers priorities for improvement

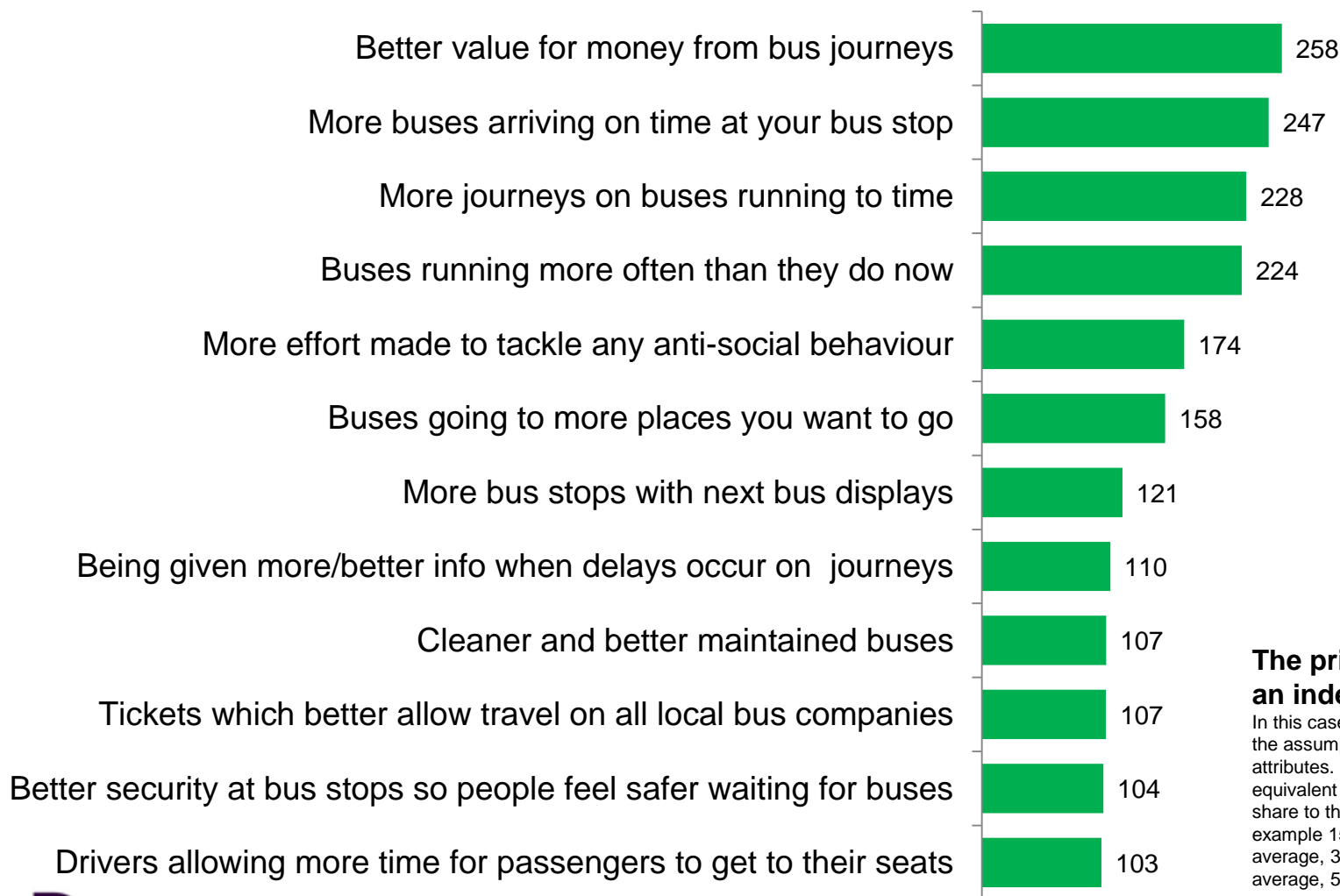
Top priorities for improvement – price, punctuality and scheduling

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

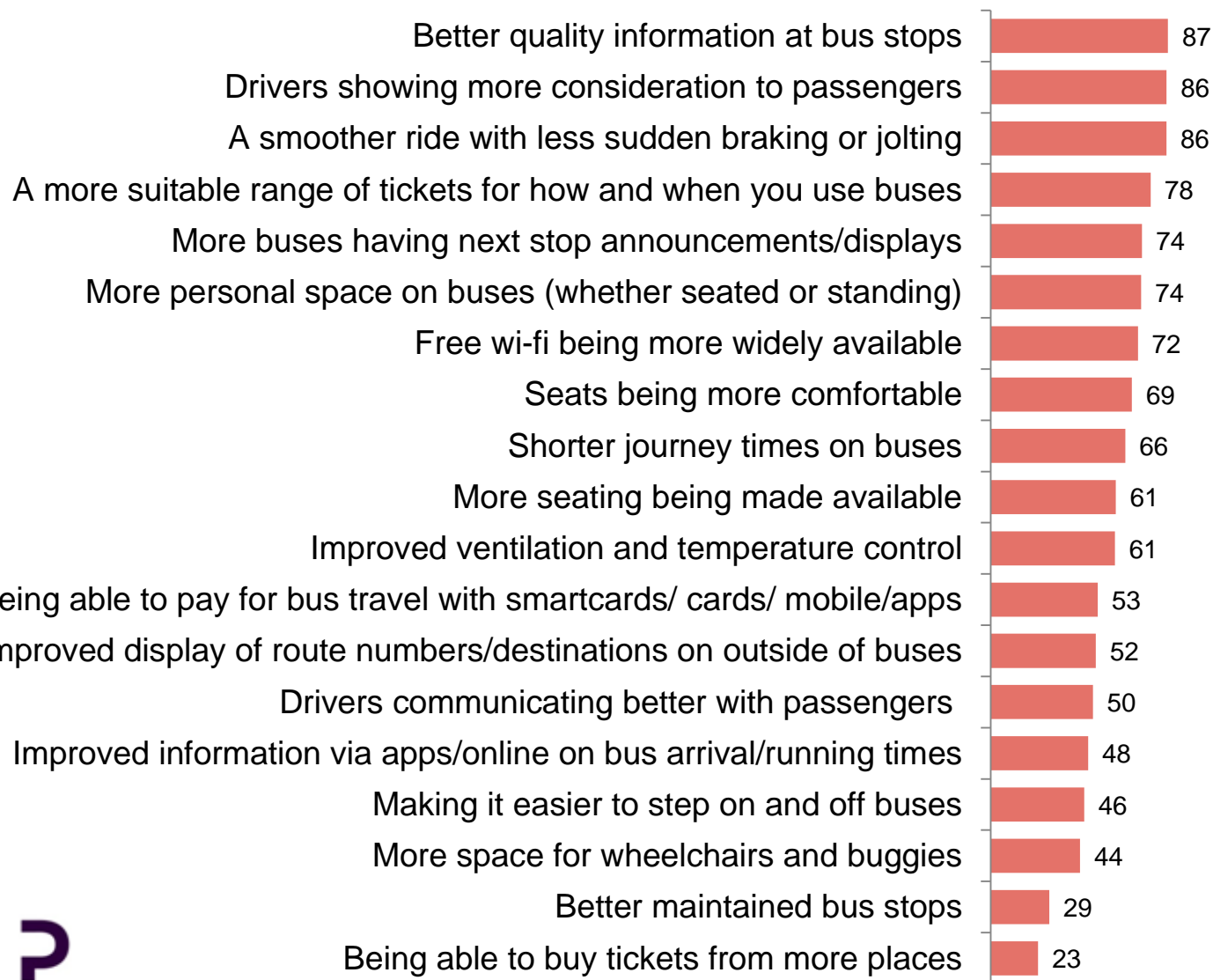


The priorities are shown as an index averaged on 100.

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 Yorkshir		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

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

Priorities by age/gender			Male			Female		
	Overall		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	297	137	300	313	130
More buses arriving on time at your bus stop	247	2	214	244	275	225	255	269
More journeys on buses running to time	228	3	204	230	243	214	236	233
Buses running more often than they do now	224	4	196	229	244	209	233	223
More effort made to tackle any anti-social behaviour	174	5	160	174	172	184	177	176
Buses going to more places you want to go	158	6	150	166	154	155	165	144
More bus stops with next bus displays	121	7	107	110	159	112	104	160
Being given more/better information when delays occur on journeys	110	8	108	107	120	109	105	121
Cleaner and better maintained buses	107	9	102	102	123	100	101	123
Tickets which better allow travel on all local bus companies	107	10	122	119	53	127	130	54
Better security at bus stops so people feel safer waiting for buses	104	11	103	105	98	116	104	101
Drivers allowing more time for passengers to get to their seats	103	12	68	78	132	80	108	175
Better quality information at bus stops	87	13	80	81	106	83	78	108
Drivers showing more consideration to passengers	86	14	71	75	98	76	89	119
A smoother ride with less sudden braking or jolting	86	15	65	71	118	65	83	137
A more suitable range of tickets for how and when you use buses	78	16	98	89	33	98	94	33
More buses having next stop announcements/displays	74	17	74	69	88	75	64	89
More personal space on buses (whether seated or standing)	74	18	69	72	98	64	66	84
Free wi-fi being more widely available	72	19	156	88	30	94	45	20
Seats being more comfortable	69	20	66	68	93	60	60	81
Shorter journey times on buses	66	21	77	72	62	71	62	49
More seating being made available	61	22	60	61	74	55	57	66
Improved ventilation and temperature control	61	23	61	58	76	56	53	71
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	93	59	25	71	43	21
Improved display of route numbers / destinations on outside of buses	52	25	54	50	56	52	47	56
Drivers communicating better with passengers	50	26	46	45	55	47	50	64
Improved information via apps/online on bus arrival/running times	48	27	71	51	33	61	40	30
Making it easier to step on and off buses	46	28	38	39	56	39	45	66
More space for wheelchairs and buggies	44	29	39	39	47	42	45	56
Better maintained bus stops	29	30	31	28	30	29	26	30
Being able to buy tickets from more places	23	31	35	26	13	30	22	11

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

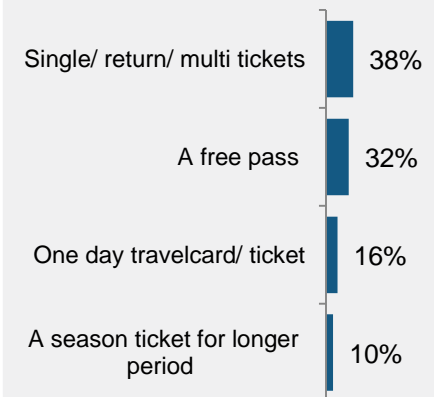
Those without a free pass prioritise better value for money tickets which allow travel on multiple local bus companies

Priorities by

Priorities by	Overall		Do not have free pass		Have free pass	
<u>Better value for money from bus journeys</u>	258	1	313	1	142	8
More buses arriving on time at your bus stop	247	2	235	2	271	1
More journeys on buses running to time	228	3	223	3	238	2
Buses running more often than they do now	224	4	219	4	233	3
More effort made to tackle any anti-social behaviour	174	5	176	5	170	4
Buses going to more places you want to go	158	6	162	6	150	6
More bus stops with next bus displays	121	7	104	10	156	5
Being given more/better information when delays occur on journeys	110	8	106	9	120	11
Cleaner and better maintained buses	107	9	100	11	121	10
<u>Tickets which better allow travel on all local bus companies</u>	107	10	131	7	56	23
<u>Better security at bus stops so people feel safer waiting for buses</u>	104	11	107	8	98	14
<u>Drivers allowing more time for passengers to get to their seats</u>	103	12	81	14	149	7
Better quality information at bus stops	87	13	78	15	105	13
Drivers showing more consideration to passengers	86	14	76	16	108	12
A smoother ride with less sudden braking or jolting	86	15	68	18	124	9
<u>A more suitable range of tickets for how and when you use buses</u>	78	16	99	12	36	26
<u>More buses having next stop announcements/displays</u>	74	17	68	19	87	16
More personal space on buses (whether seated or standing)	74	18	67	20	89	15
<u>Free wi-fi being more widely available</u>	72	19	91	13	33	28
Seats being more comfortable	69	20	62	22	86	17
Shorter journey times on buses	66	21	70	17	57	22
More seating being made available	61	22	58	23	69	19
Improved ventilation and temperature control	61	23	55	24	73	18
<u>Being able to pay for bus travel with smartcards/ contactless cards etc.</u>	53	24	65	21	25	30
Improved display of route numbers / destinations on outside of buses	52	25	49	26	56	24
Drivers communicating better with passengers	50	26	46	27	60	21
Improved information via apps/online on bus arrival/running times	48	27	54	25	34	27
Making it easier to step on and off buses	46	28	39	29	60	20
More space for wheelchairs and buggies	44	29	40	28	51	25
Better maintained bus stops	29	30	28	30	30	29
Being able to buy tickets from more places	23	31	28	31	13	31

Free pass

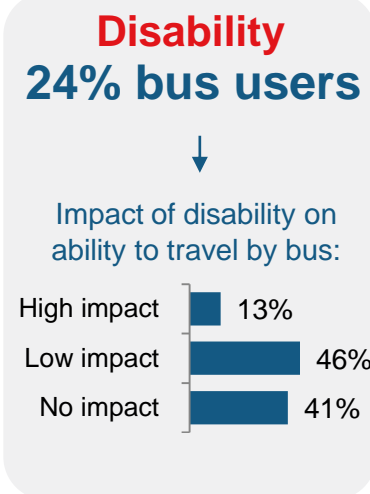
32% bus users



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

Priorities by level of impact disability has on travelling by bus

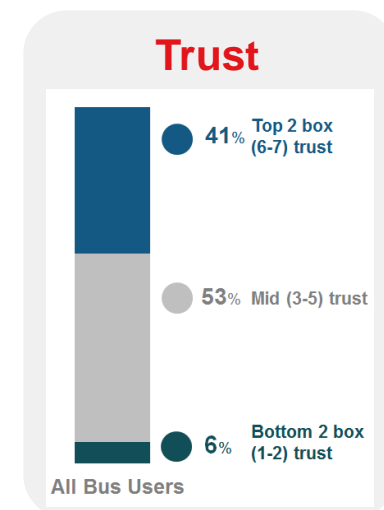
	Overall		Yes high impact		Yes low impact		No impact	
Better value for money from bus journeys	258	1	183	4	212	4	269	1
More buses arriving on time at your bus stop	247	2	204	2	245	1	248	2
More journeys on buses running to time	228	3	187	3	221	2	229	3
Buses running more often than they do now	224	4	163	5	217	3	226	4
<u>More effort made to tackle any anti-social behaviour</u>	174	5	230	1	190	5	171	5
Buses going to more places you want to go	158	6	128	9	150	6	160	6
More bus stops with next bus displays	121	7	116	11	113	10	121	7
Being given more/better information when delays occur on journeys	110	8	108	13	105	13	111	9
<u>Cleaner and better maintained buses</u>	107	9	135	8	119	8	104	10
<u>Tickets which better allow travel on all local bus companies</u>	107	10	74	20	85	15	112	8
Better security at bus stops so people feel safer waiting for buses	104	11	136	7	111	11	104	11
<u>Drivers allowing more time for passengers to get to their seats</u>	103	12	155	6	147	7	93	12
Better quality information at bus stops	87	13	86	16	83	16	87	13
Drivers showing more consideration to passengers	86	14	115	12	106	12	81	15
<u>A smoother ride with less sudden braking or jolting</u>	86	15	124	10	116	9	79	17
A more suitable range of tickets for how and when you use buses	78	16	48	26	58	24	83	14
More buses having next stop announcements/displays	74	17	76	18	70	18	74	18
<u>More personal space on buses (whether seated or standing)</u>	74	18	100	14	85	14	71	19
Free wi-fi being more widely available	72	19	39	28	48	27	80	16
Seats being more comfortable	69	20	93	15	80	17	66	21
Shorter journey times on buses	66	21	54	25	59	22	68	20
More seating being made available	61	22	75	19	68	20	60	22
Improved ventilation and temperature control	61	23	84	17	69	19	59	23
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	46	27	38	28	57	24
Improved display of route numbers / destinations on outside of buses	52	25	55	24	50	26	52	25
Drivers communicating better with passengers	50	26	65	22	58	23	48	27
Improved information via apps/online on bus arrival/running times	48	27	38	29	37	29	51	26
Making it easier to step on and off buses	46	28	66	21	59	21	43	28
More space for wheelchairs and buggies	44	29	60	23	53	25	42	29
Better maintained bus stops	29	30	35	30	30	30	28	30
Being able to buy tickets from more places	23	31	21	31	19	31	25	31



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	229	1	296	3
More buses arriving on time at your bus stop	247	2	221	2	310	2
More journeys on buses running to time	228	3	203	3	284	4
Buses running more often than they do now	224	4	191	4	311	1
More effort made to tackle any anti-social behaviour	174	5	190	5	150	6
Buses going to more places you want to go	158	6	144	6	187	5
More bus stops with next bus displays	121	7	126	7	95	10
Being given more/better information when delays occur on journeys	110	8	110	11	102	8
Cleaner and better maintained buses	107	9	117	8	92	11
Tickets which better allow travel on all local bus companies	107	10	98	12	113	7
Better security at bus stops so people feel safer waiting for buses	104	11	115	10	84	12
Drivers allowing more time for passengers to get to their seats	103	12	117	9	100	9
Better quality information at bus stops	87	13	90	15	72	17
Drivers showing more consideration to passengers	86	14	94	14	81	13
A smoother ride with less sudden braking or jolting	86	15	97	13	81	14
A more suitable range of tickets for how and when you use buses	78	16	72	20	78	15
More buses having next stop announcements/displays	74	17	80	17	54	21
More personal space on buses (whether seated or standing)	74	18	84	16	60	18
Free wi-fi being more widely available	72	19	75	19	40	26
Seats being more comfortable	69	20	80	18	55	19
Shorter journey times on buses	66	21	60	23	75	16
More seating being made available	61	22	67	22	55	20
Improved ventilation and temperature control	61	23	71	21	47	22
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	54	26	34	29
Improved display of route numbers / destinations on outside of buses	52	25	55	25	42	24
Drivers communicating better with passengers	50	26	55	24	45	23
Improved information via apps/online on bus arrival/running times	48	27	48	29	35	28
Making it easier to step on and off buses	46	28	53	27	40	25
More space for wheelchairs and buggies	44	29	49	28	39	27
Better maintained bus stops	29	30	32	30	23	30
Being able to buy tickets from more places	23	31	24	31	18	31

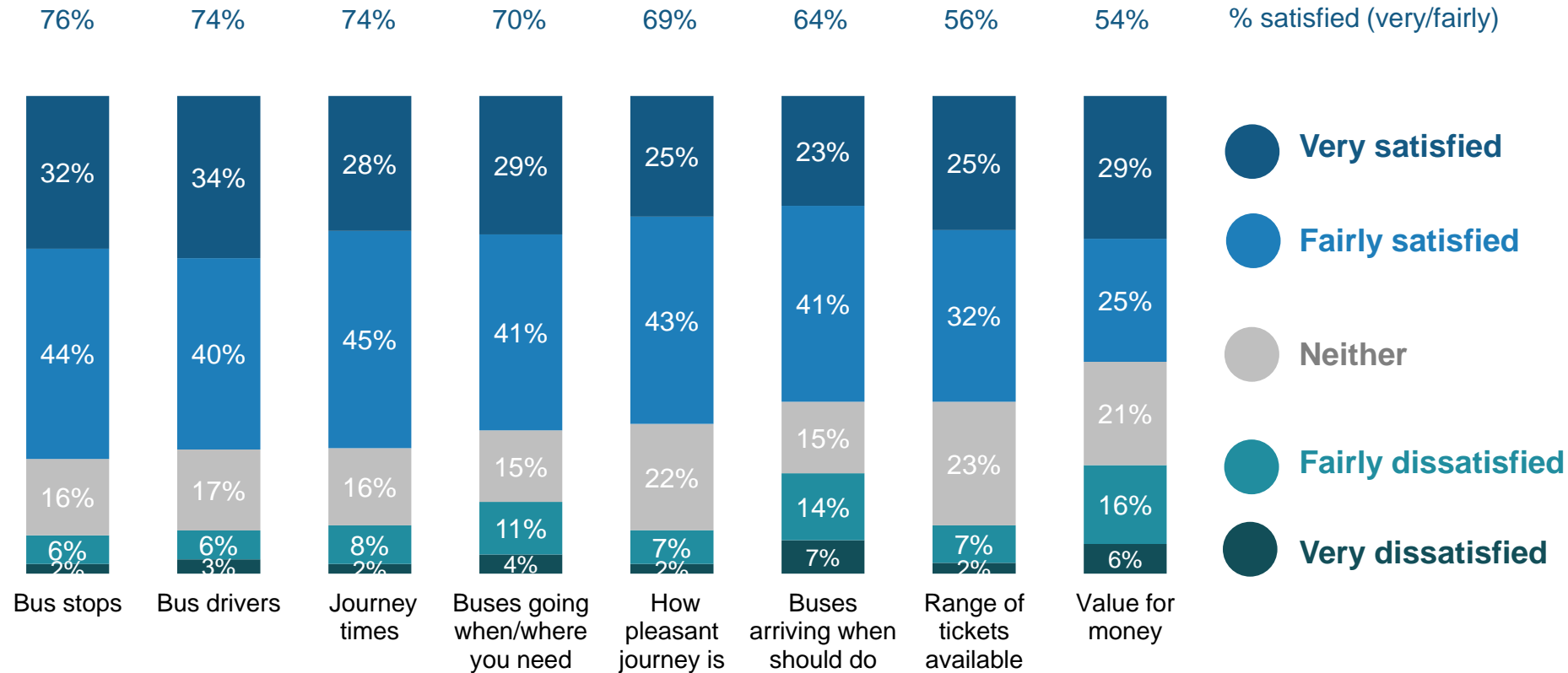


Priorities for improvement and satisfaction

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 →



Satisfaction with service aspects varies by PTE area

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

Higher

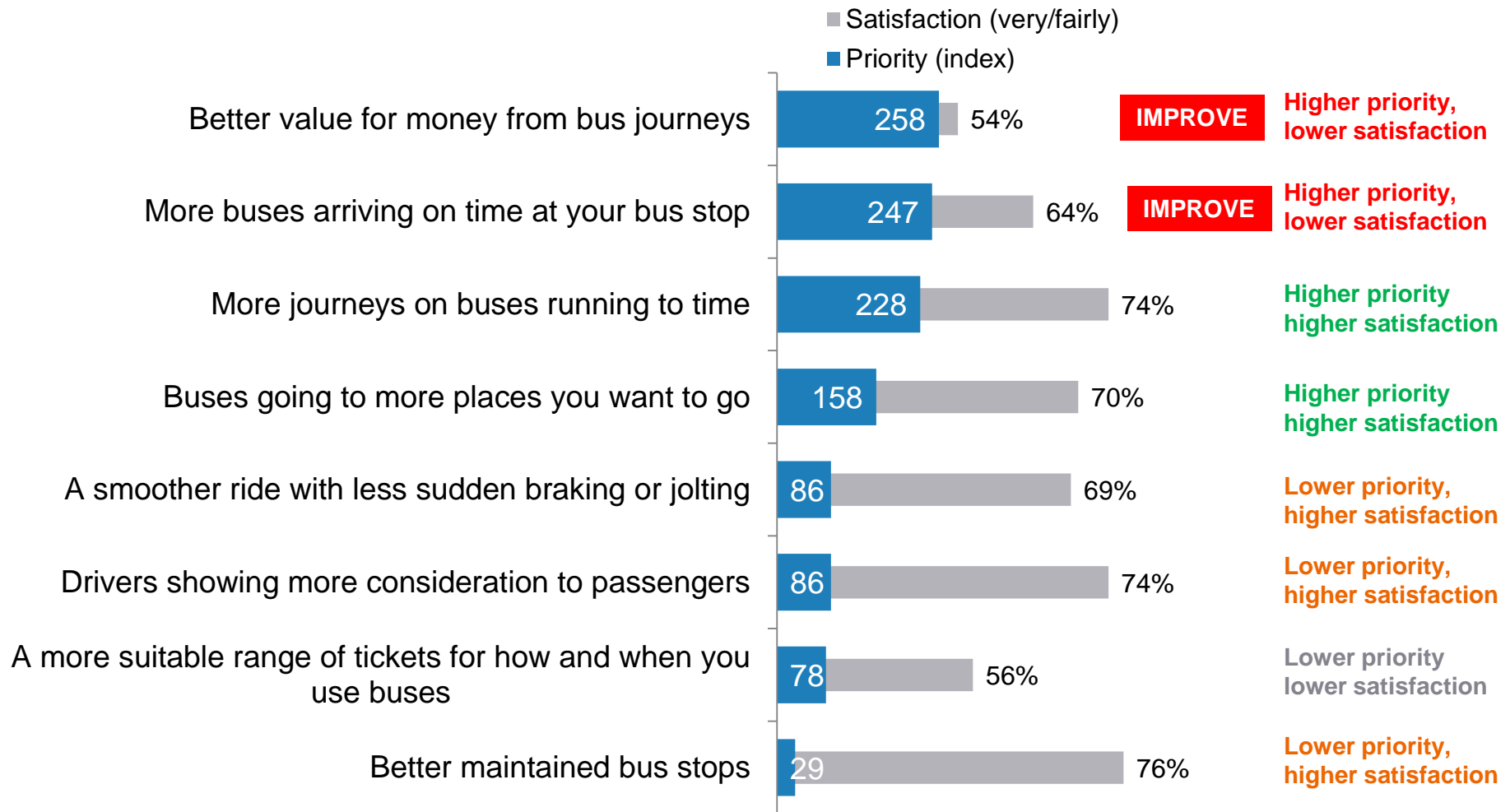
Lower

significantly different to bus users at 95%

	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
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%

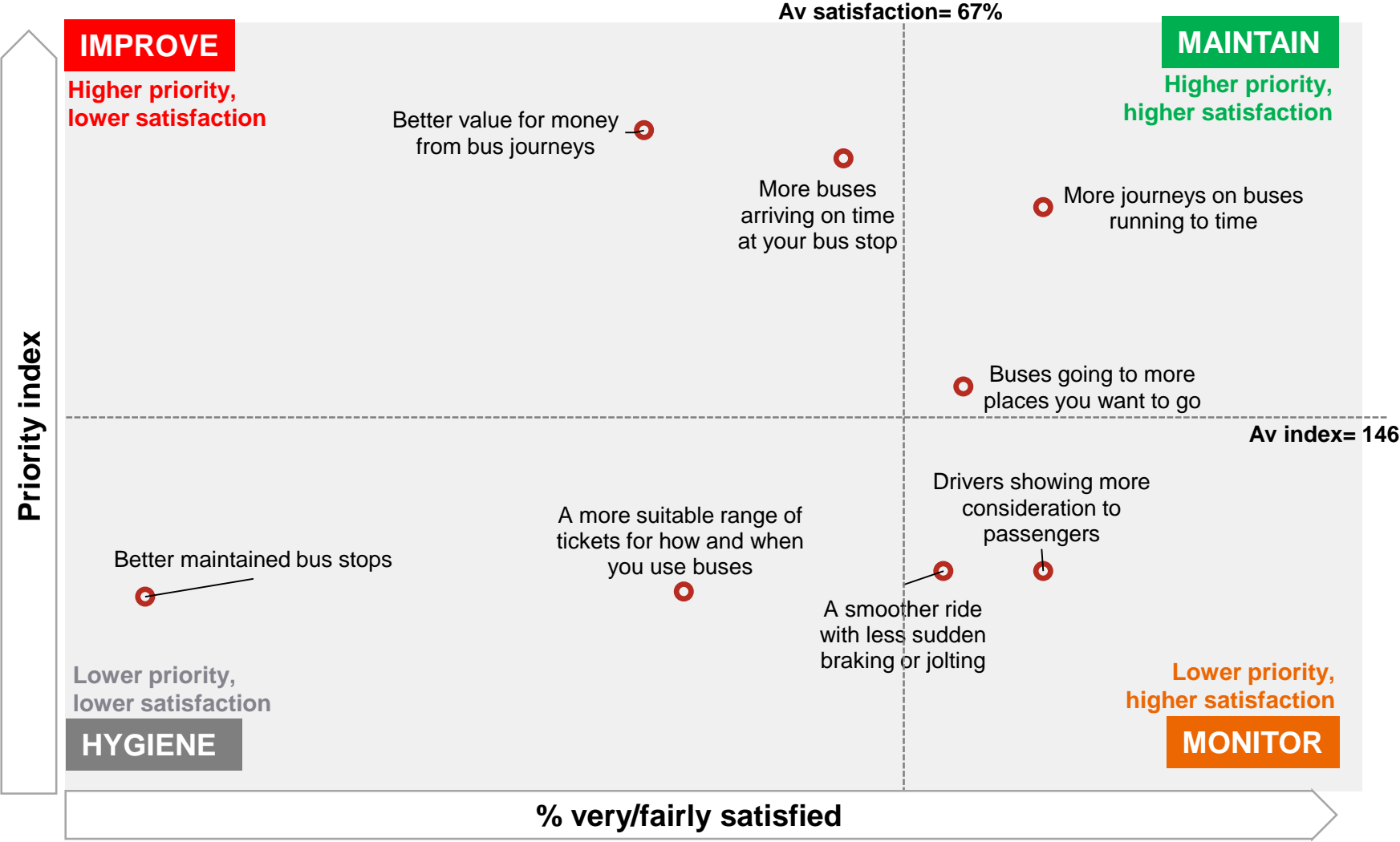
Value for money and buses arriving on time are key passenger priorities that show lower levels of satisfaction

Key satisfaction measures versus priorities: all bus users



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

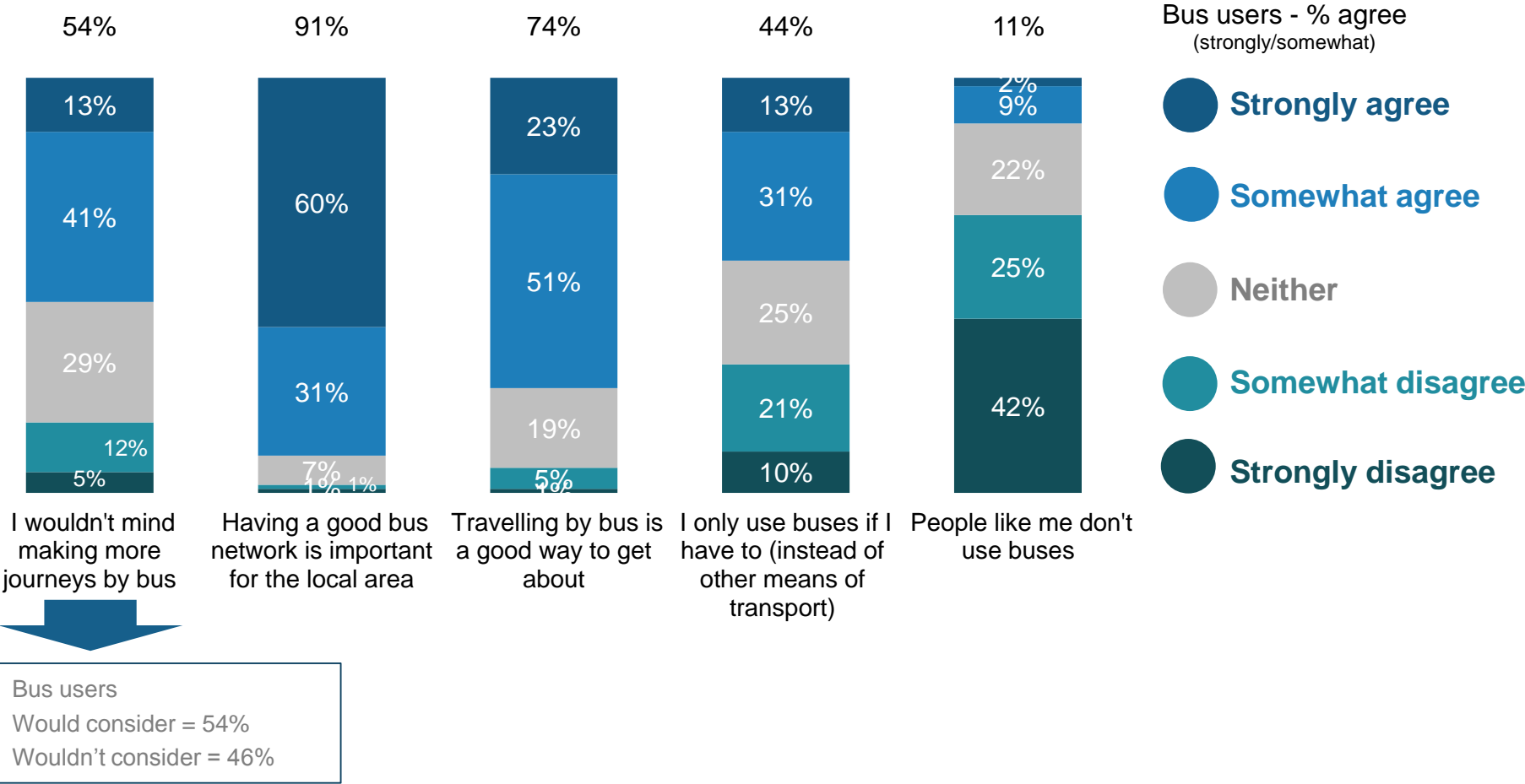


Q17. To what extent do you agree or disagree with each of the following statements? The bus company that runs most of the services you use ...
Base: all bus users n=4,664

Bus users versus non-users: attitudes to bus travel

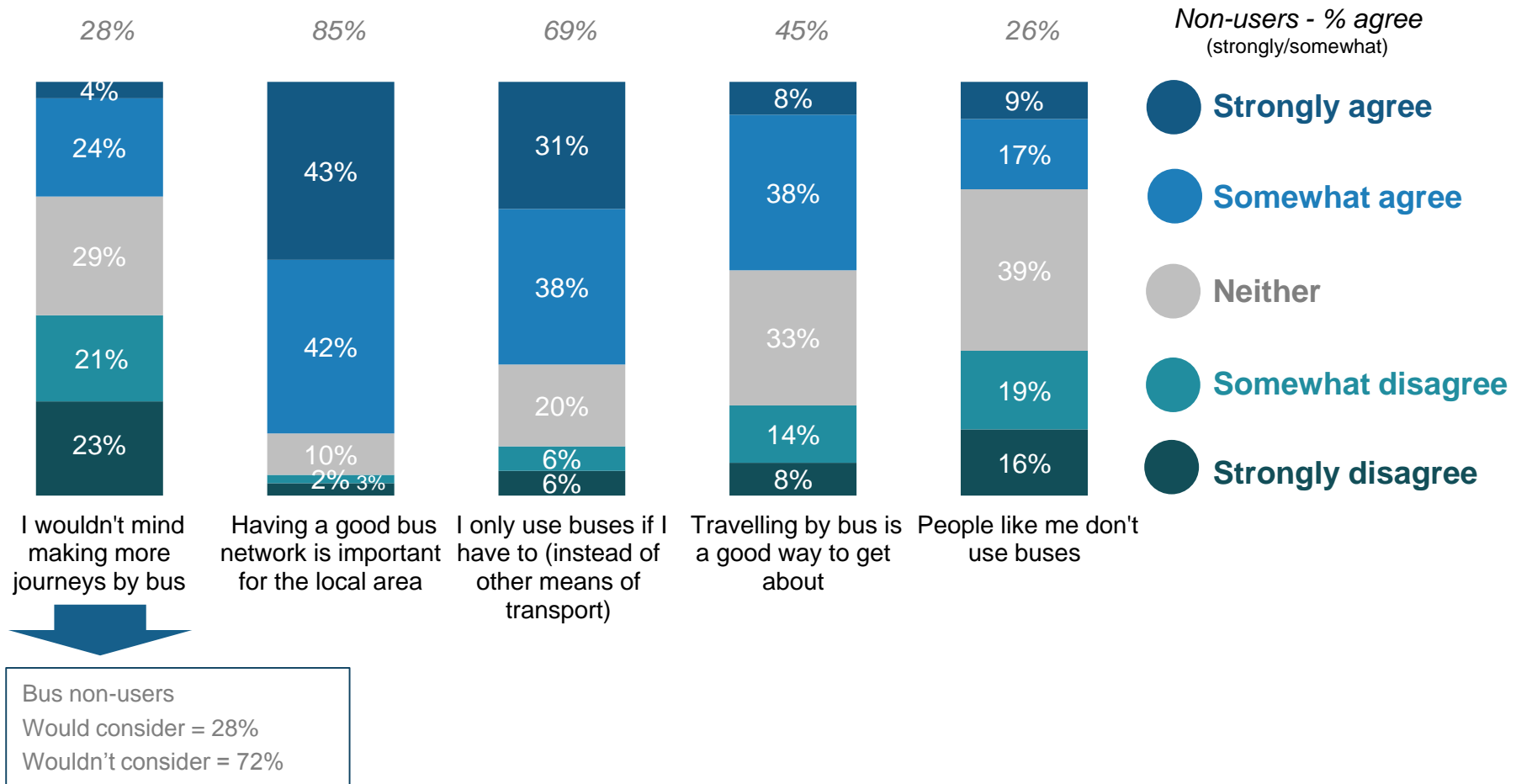
Around half of users wouldn't mind making more trips by bus.
Most users agree the bus network is important for the local area,
and is a good form of transport.

Per cent agree with statement: all bus users



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



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	269	1
More buses arriving on time at your bus stop	247	2	245	2	249	2
More journeys on buses running to time	228	3	225	3	231	4
Buses running more often than they do now	224	4	217	4	231	3
More effort made to tackle any anti-social behaviour	174	5	172	5	176	5
Buses going to more places you want to go	158	6	155	6	160	6
More bus stops with next bus displays	121	7	131	7	109	7
Being given more/better information when delays occur on journeys	110	8	113	8	107	9
Cleaner and better maintained buses	107	9	108	9	105	10
Tickets which better allow travel on all local bus companies	107	10	105	11	109	8
Better security at bus stops so people feel safer waiting for buses	104	11	104	12	105	11
Drivers allowing more time for passengers to get to their seats	103	12	107	10	98	12
Better quality information at bus stops	87	13	93	13	81	15
Drivers showing more consideration to passengers	86	14	89	14	83	14
A smoother ride with less sudden braking or jolting	86	15	88	15	84	13
A more suitable range of tickets for how and when you use buses	78	16	77	17	80	16
More buses having next stop announcements/displays	74	17	80	16	68	21
More personal space on buses (whether seated or standing)	74	18	73	18	75	18
Free wi-fi being more widely available	72	19	66	20	80	17
Seats being more comfortable	69	20	68	19	70	19
Shorter journey times on buses	66	21	63	21	70	20
More seating being made available	61	22	61	23	62	22
Improved ventilation and temperature control	61	23	62	22	60	23
Being able to pay for bus travel with smartcards/ contactless cards etc.	53	24	52	25	53	24
Improved display of route numbers / destinations on outside of buses	52	25	53	24	49	25
Drivers communicating better with passengers	50	26	52	26	49	26
Improved information via apps/online on bus arrival/running times	48	27	47	28	49	27
Making it easier to step on and off buses	46	28	48	27	44	28
More space for wheelchairs and buggies	44	29	45	29	42	29
Better maintained bus stops	29	30	29	30	28	30
Being able to buy tickets from more places	23	31	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

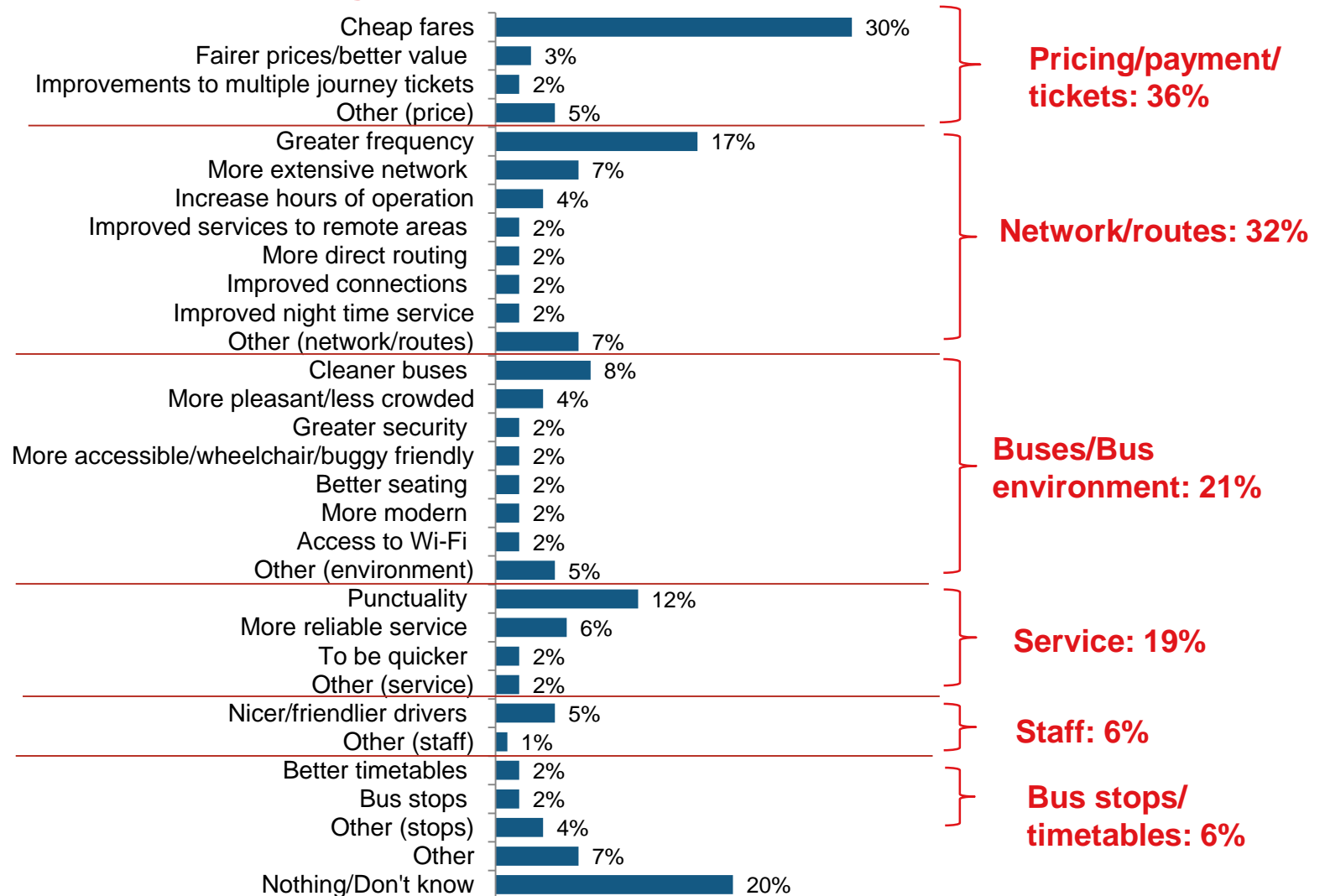
Whilst those open and not open to making more journeys both cite the above reasons most, those not open to making more journeys cite on - bus experience factors as higher secondary reasons.

Reasons for not using the bus: all non-users

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

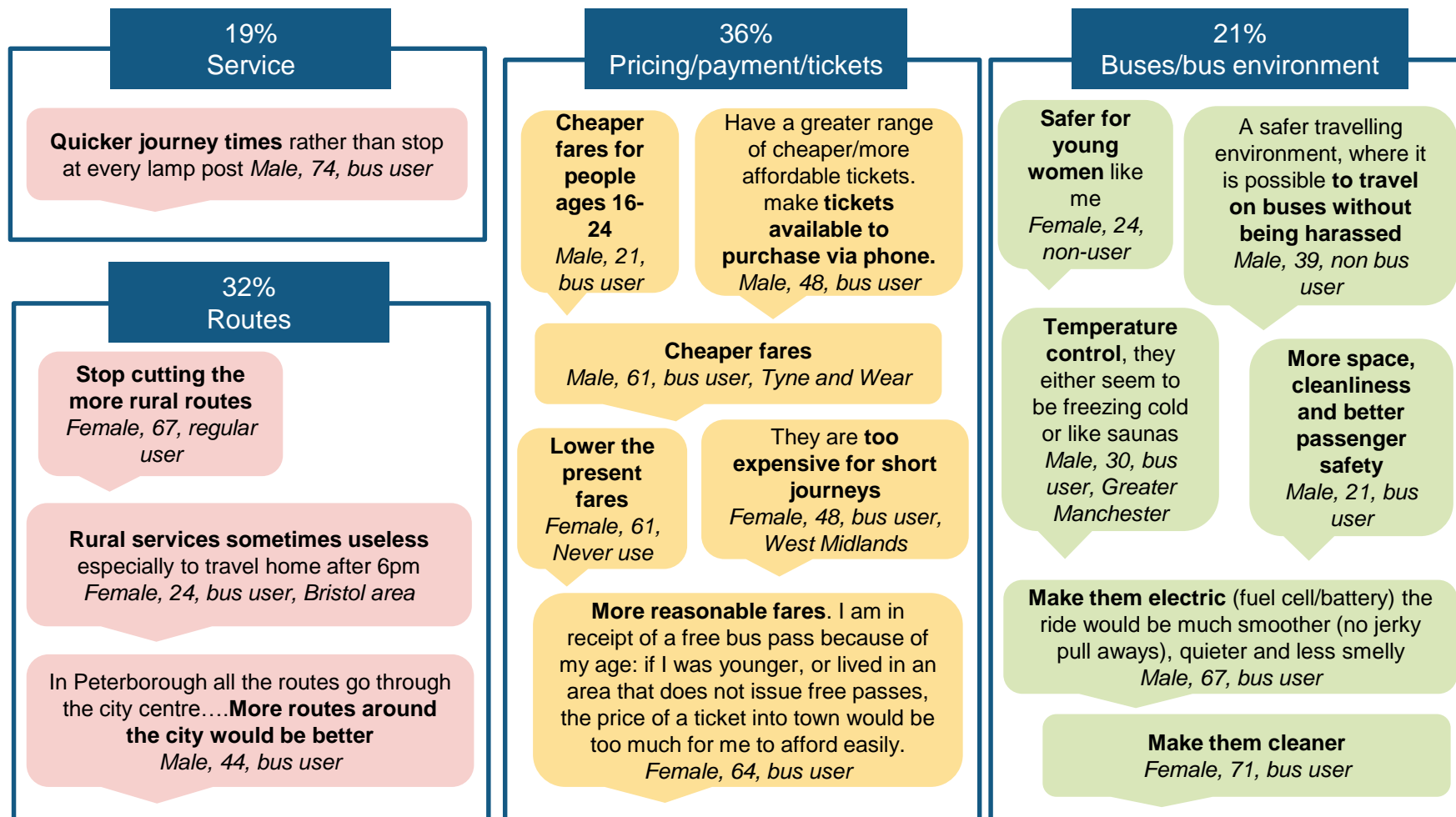
Top of mind improvements to encourage bus use focus on improving the basics: frequency, punctuality and price

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

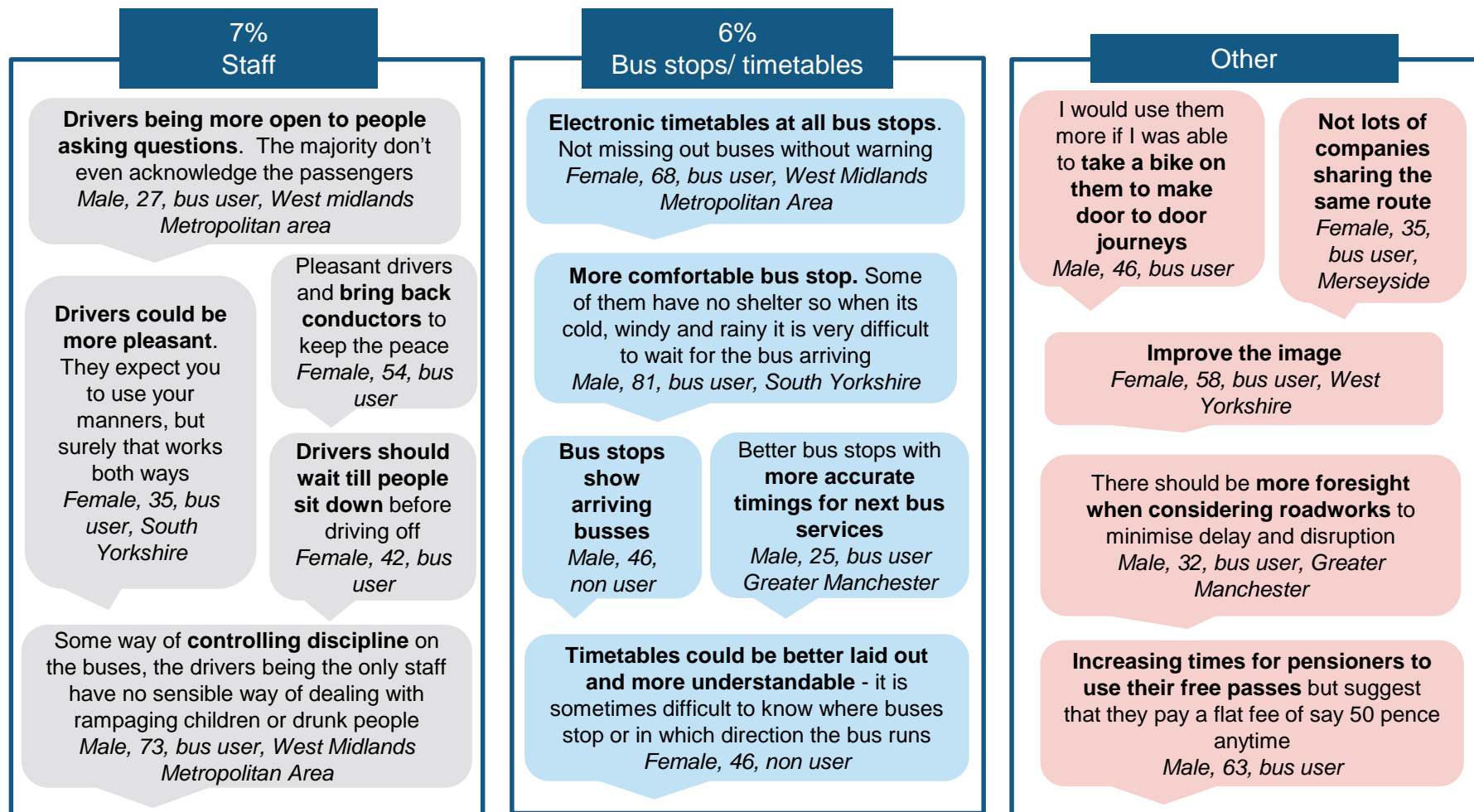


Q16. What improvements should be made to buses to encourage more people to use them?

Base: All bus users n = 4664

Secondary themes for improvement are around stops/timetables and staff

Top of mind how to encourage bus use: verbatim comments



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

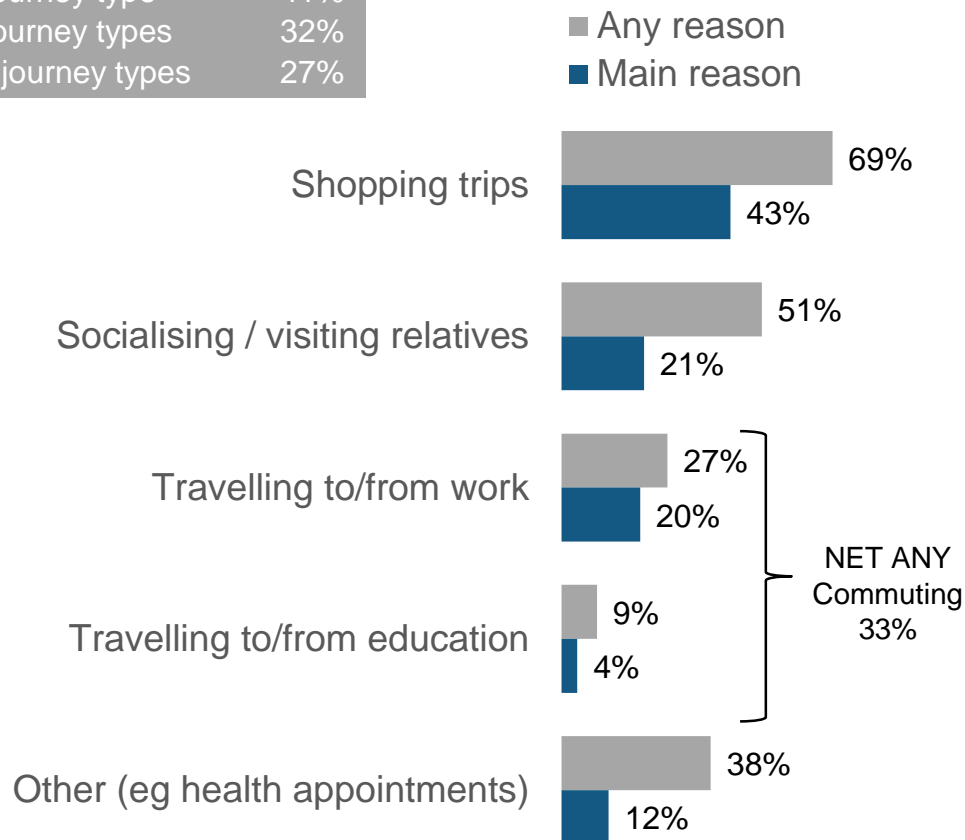
	Daily	Travel Weekly	Travel monthly	Travel at least once every 3 months	Travel less frequently than every 3 months	Never Travel on buses
Base Sizes	n=489	n=1,988	n=1,315	n=872	n=1,592	n=790
Gender						
Male	51%	49%	50%	48%	46%	46%
Female	49%	51%	50%	52%	54%	54%
Age						
16-34	48%	29%	25%	24%	21%	23%
35-54	37%	32%	30%	38%	41%	41%
55 +	15%	40%	44%	38%	38%	36%
ABC1						
ABC1	57%	53%	56%	58%	58%	48%
C2DE	43%	47%	44%	42%	42%	52%
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

Number journey types

1 journey type	41%
2 journey types	32%
3+ journey types	27%



Profile of users by main reason



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

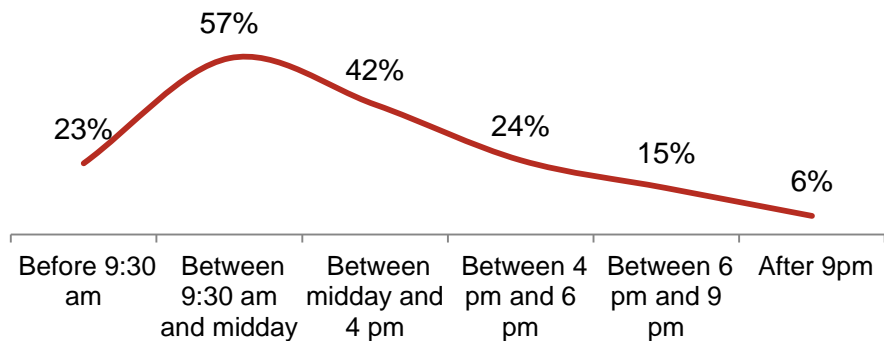
Q19. For which type of journey do you mainly use the bus?

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

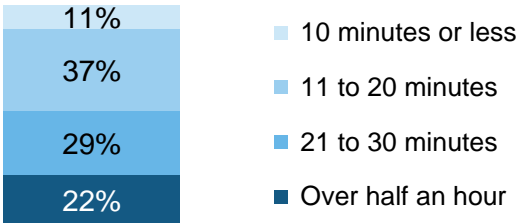
Travel profile for main bus use reason: all bus users

Times during the day travelled for main bus use reason

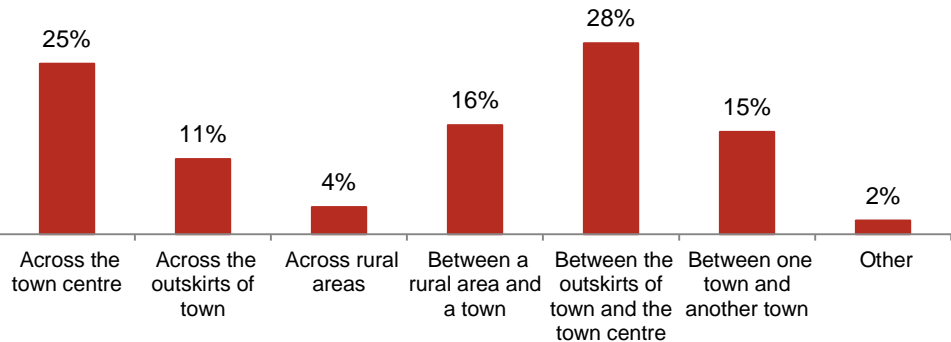


Typical length of journey

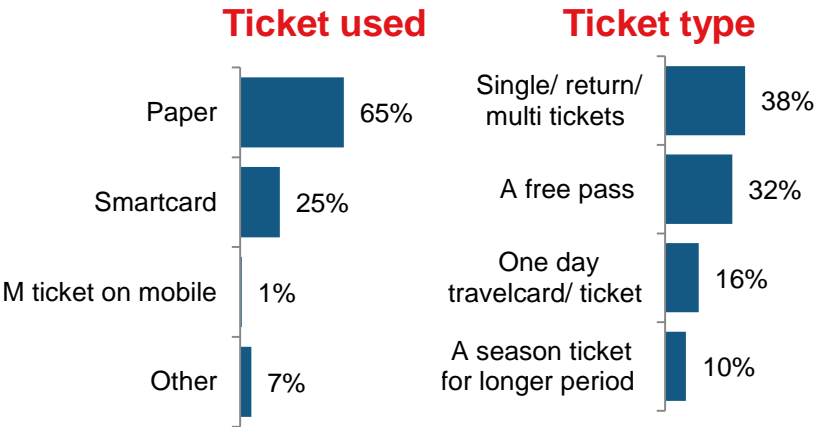
About 20 mins



Type of area travelled across for main bus use reason



Typical ticketing behaviour

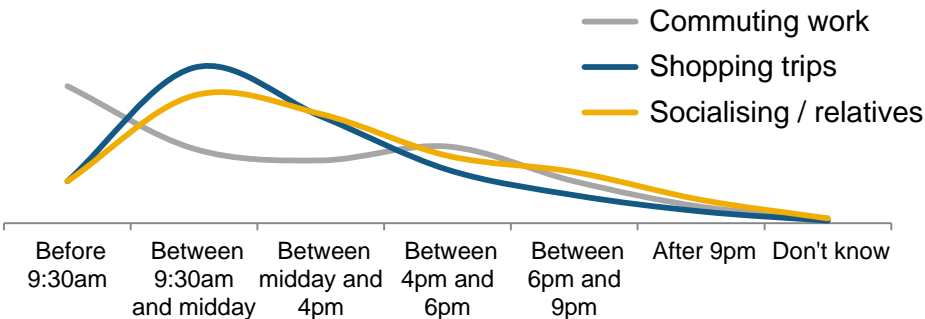


Q20. When you use the bus for [main purpose] is this mostly to travel ... Q21. When you travel by bus for [main purpose], typically how long is the time you spend on the bus for that journey? Q22. When you travel by bus for [main purpose], what type of ticket do you typically use? Q23. In what form is 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

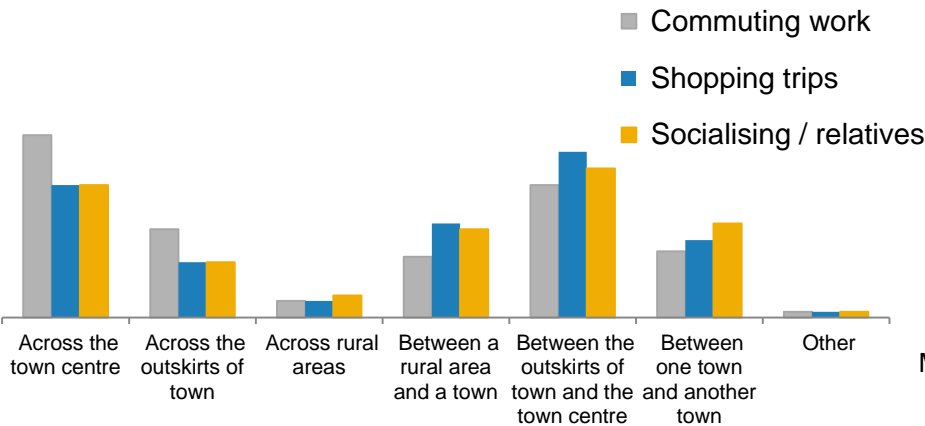
Typical time of day travelled - by trip type



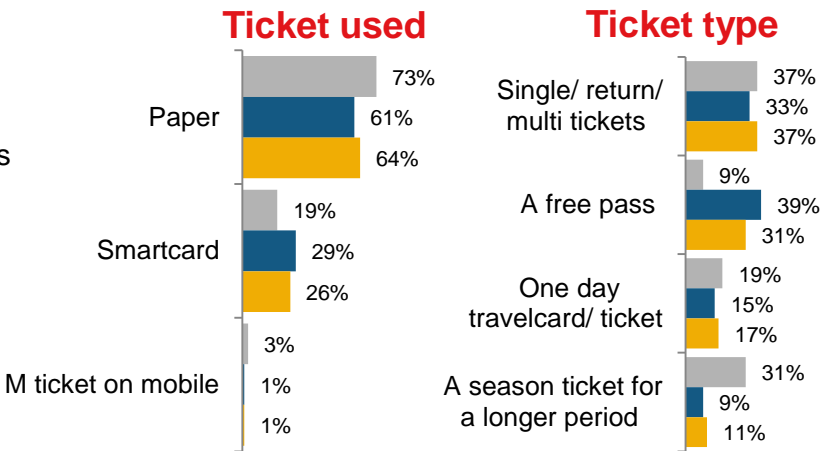
Typical length of journey - by trip type

	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

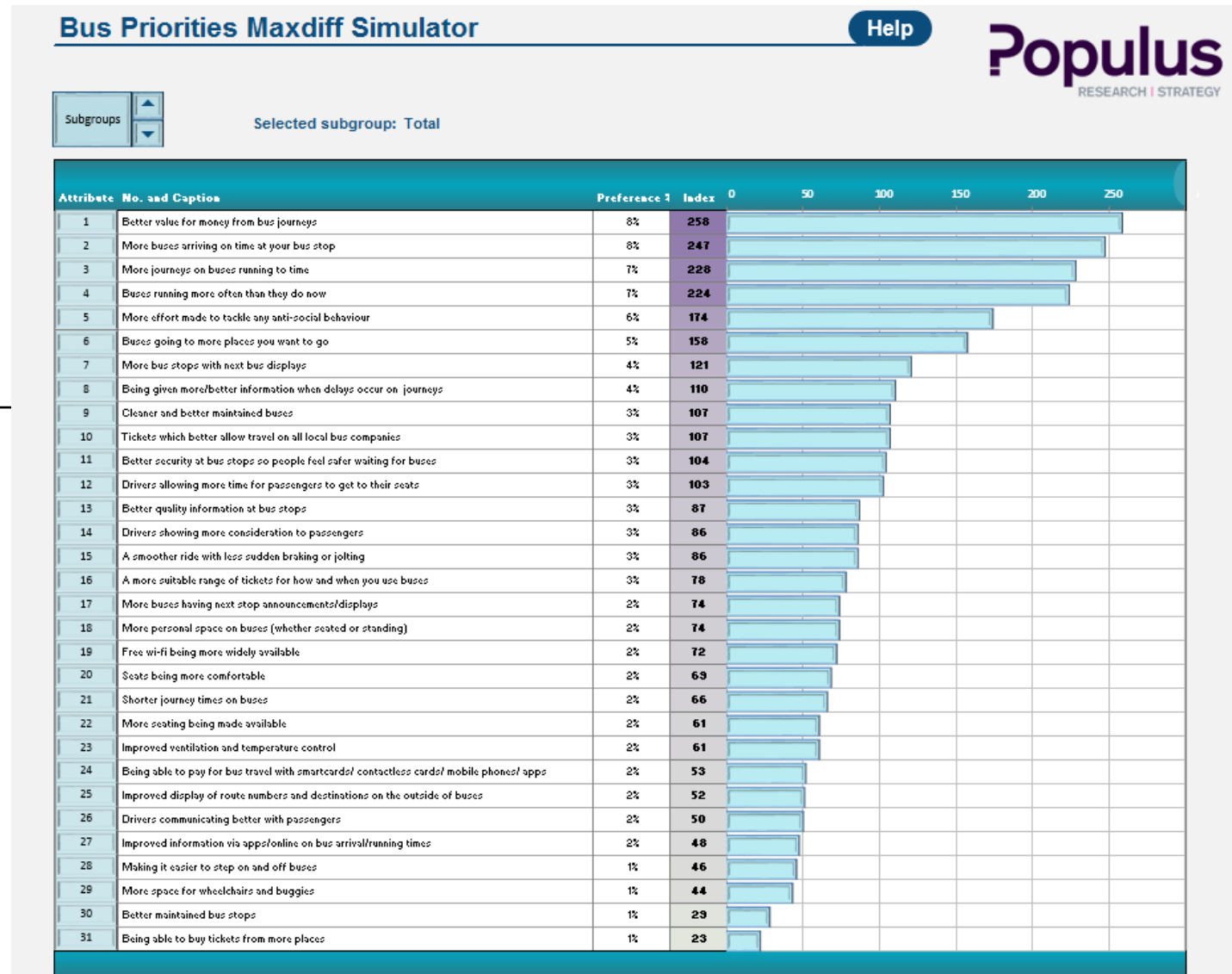
	Most important	Least important
Cleaner and better maintained buses	<input type="radio"/>	<input type="radio"/>
Free wi-fi being more widely available	<input type="radio"/>	<input checked="" type="radio"/>
Better maintained bus stops	<input checked="" type="radio"/>	<input type="radio"/>
Drivers communicating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

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

Priorities can be explored and tested further within an interactive simulator

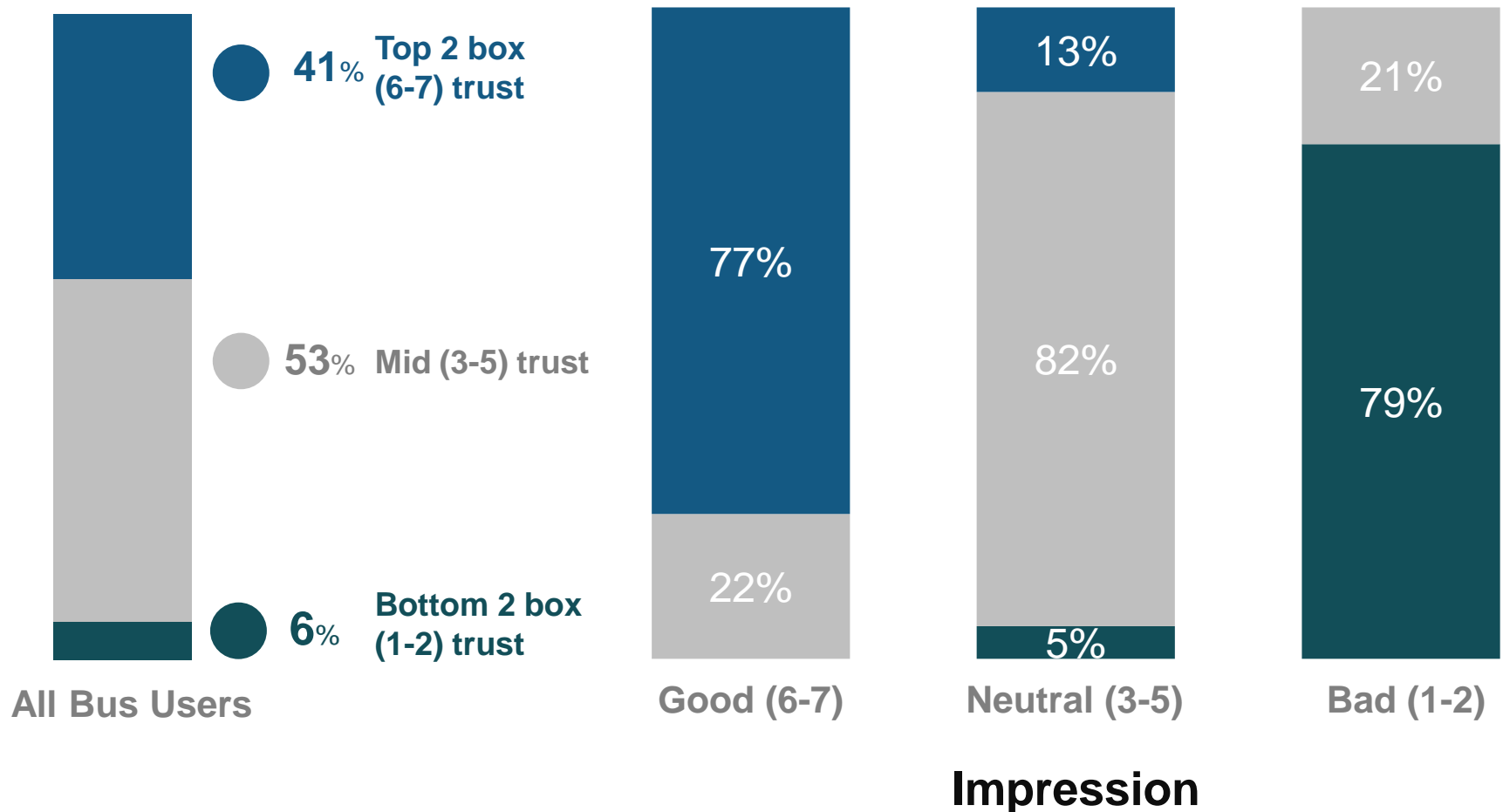
Run across pre
set sub groups

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



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

