



Is bus the missing link in delivering a Northern Powerhouse?

Manchester

16 March 2016



Is bus the missing link in delivering a Northern Powerhouse?

Welcome!

Anthony Smith, Chief Executive

@transportfocus

@anthonysmithTF

#northernpowerhouse



Research overview

Bus Passenger Survey and *Bus passengers have their say: trust, what to improve and using buses more*

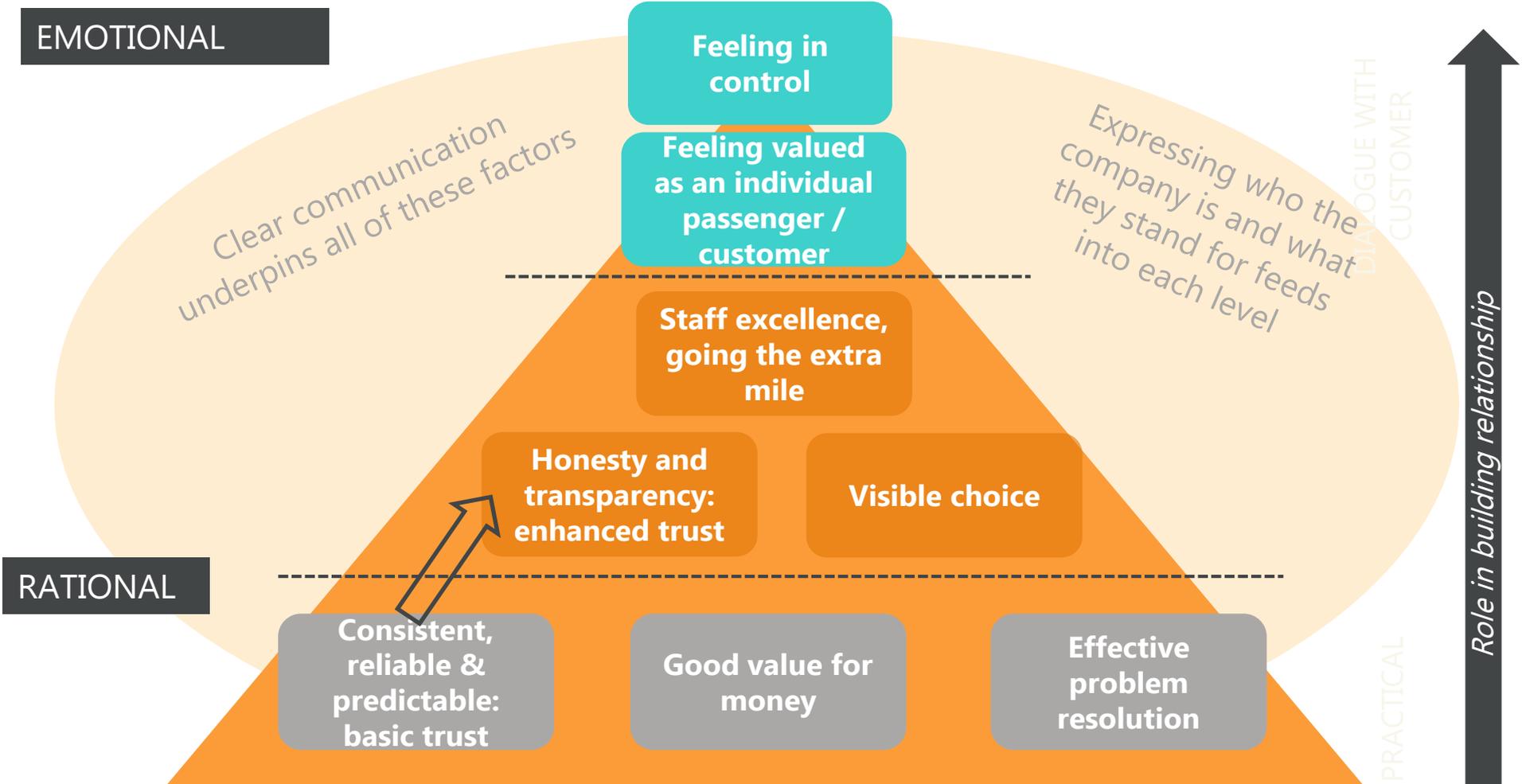
Ian Wright, Head of Insight



Trust



Building a relationship with passengers starts with getting rational factors right (trust) and becomes exceptional (feeling valued) when more emotional 'relationship' factors come into play



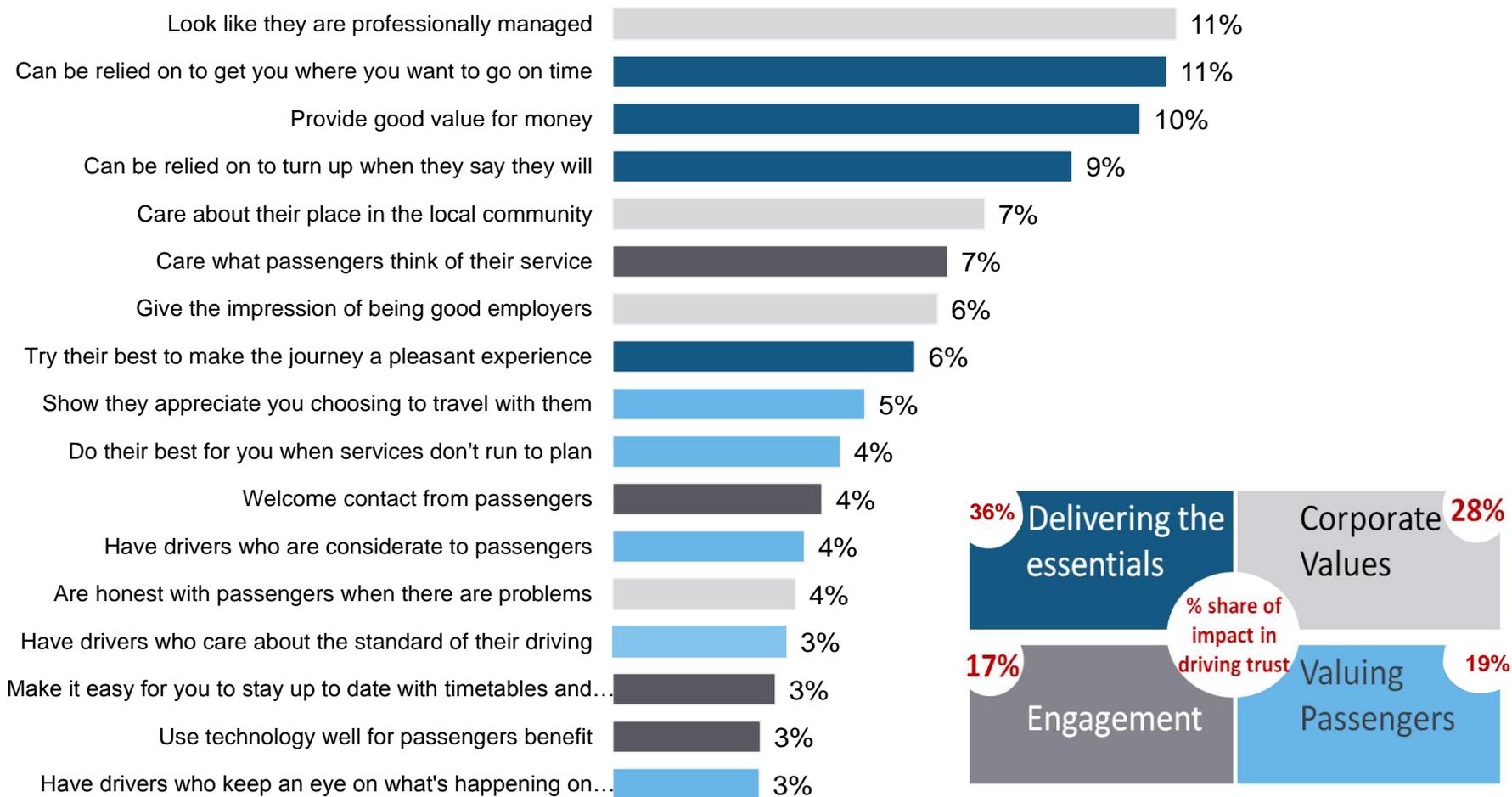
EMOTIONAL

RATIONAL

Practical factors can be very impactful in creating a sense of loyalty and closeness with a bus company – it does what it says it will do, for a reasonable price, and sorts it out if it fails. However, it is the more emotionally engaging factors that build real affinity

Trust drivers focus on perceptions of being professionally managed, offering reliability/value, and caring (community/passengers)

Drivers of trust - share of contribution to overall trust: All Bus users

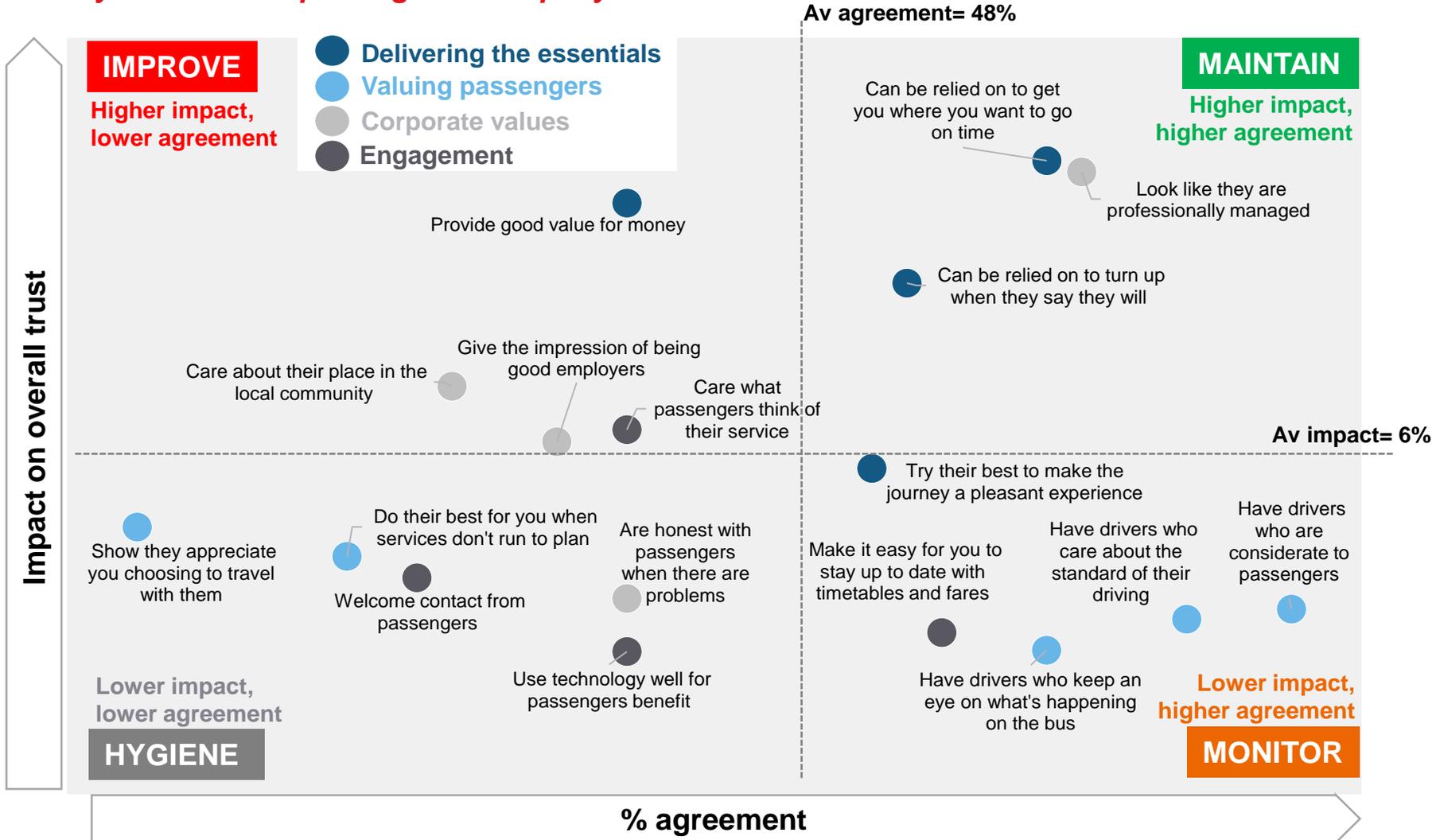


Q17. To what extent do you agree or disagree with each of the following statements? Q13. All things considered, how much do you trust the bus company that runs most of the services you use? n=4,664
R-squared = 58%



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

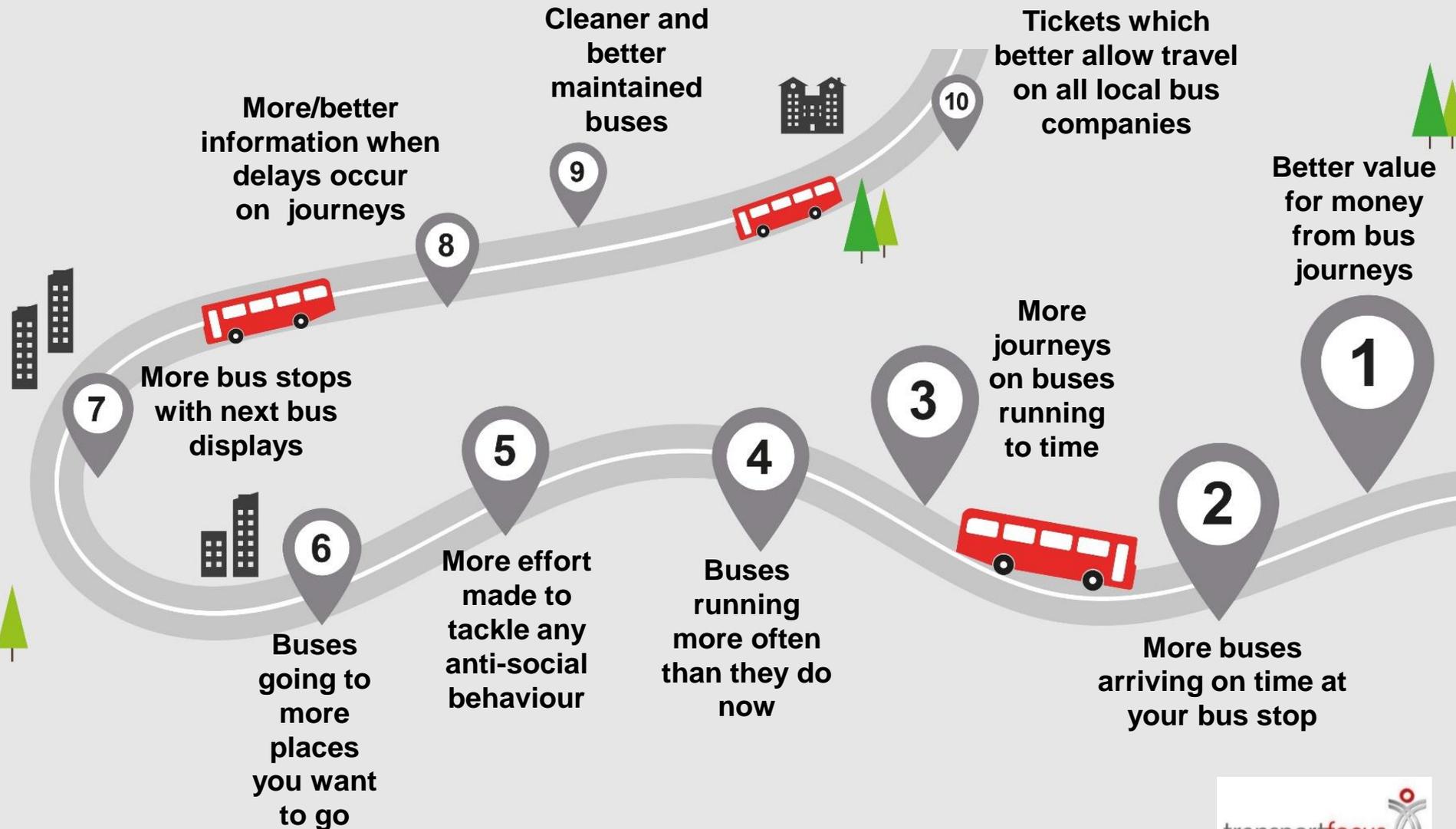




Priorities for improvement

Top priorities – price, punctuality and scheduling

Top priorities for improvement – top ten priorities: All Bus users





Non users

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

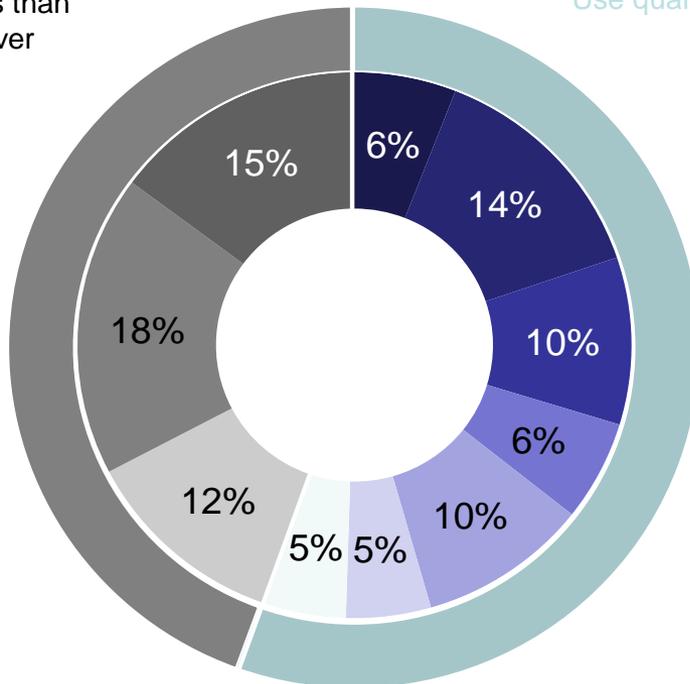
Bus usage: All respondents representative

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

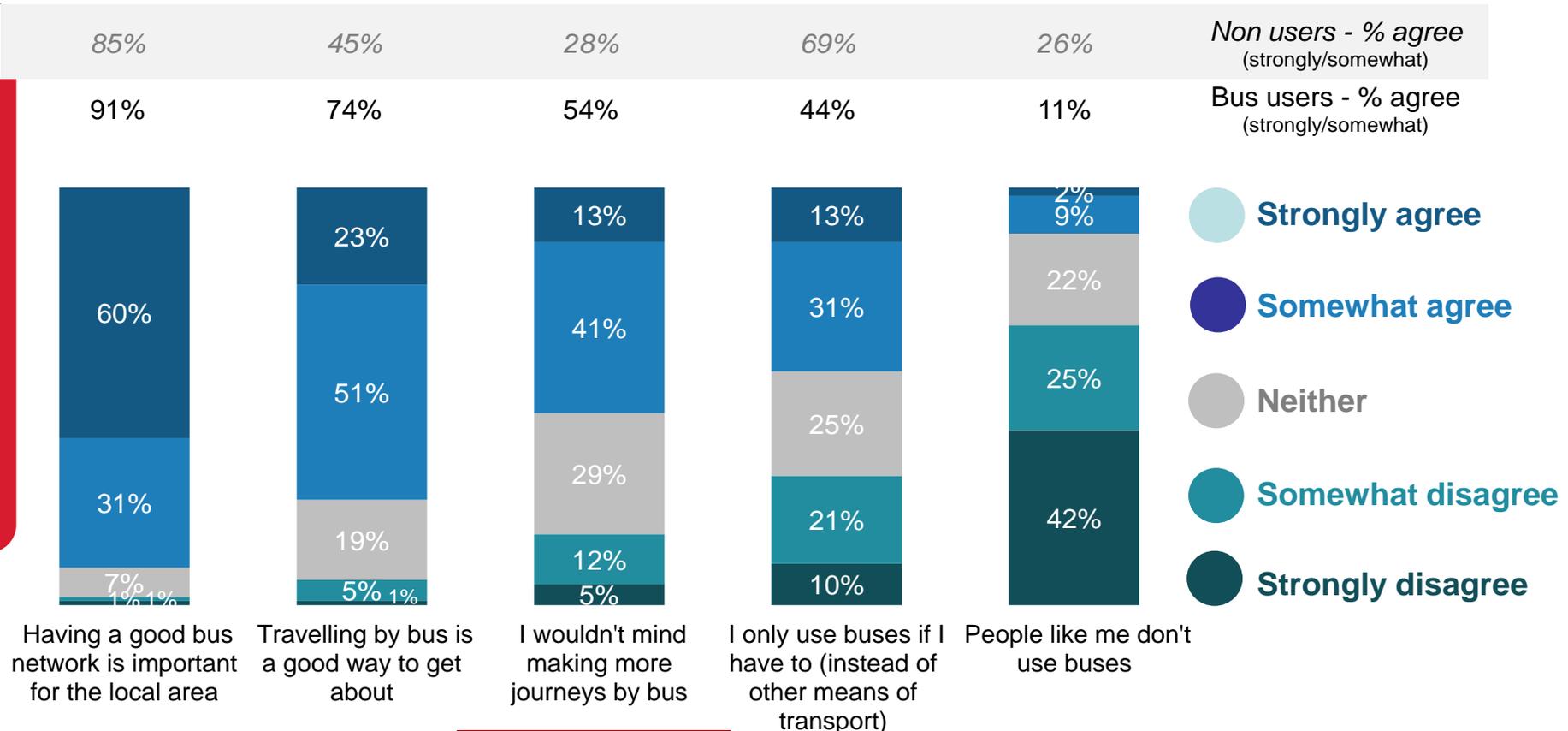
Once every few months

Less frequently



Most users agree the network is important for the local area, and is good form of transport. More than half would make more trips

% agree with statement: All Bus users



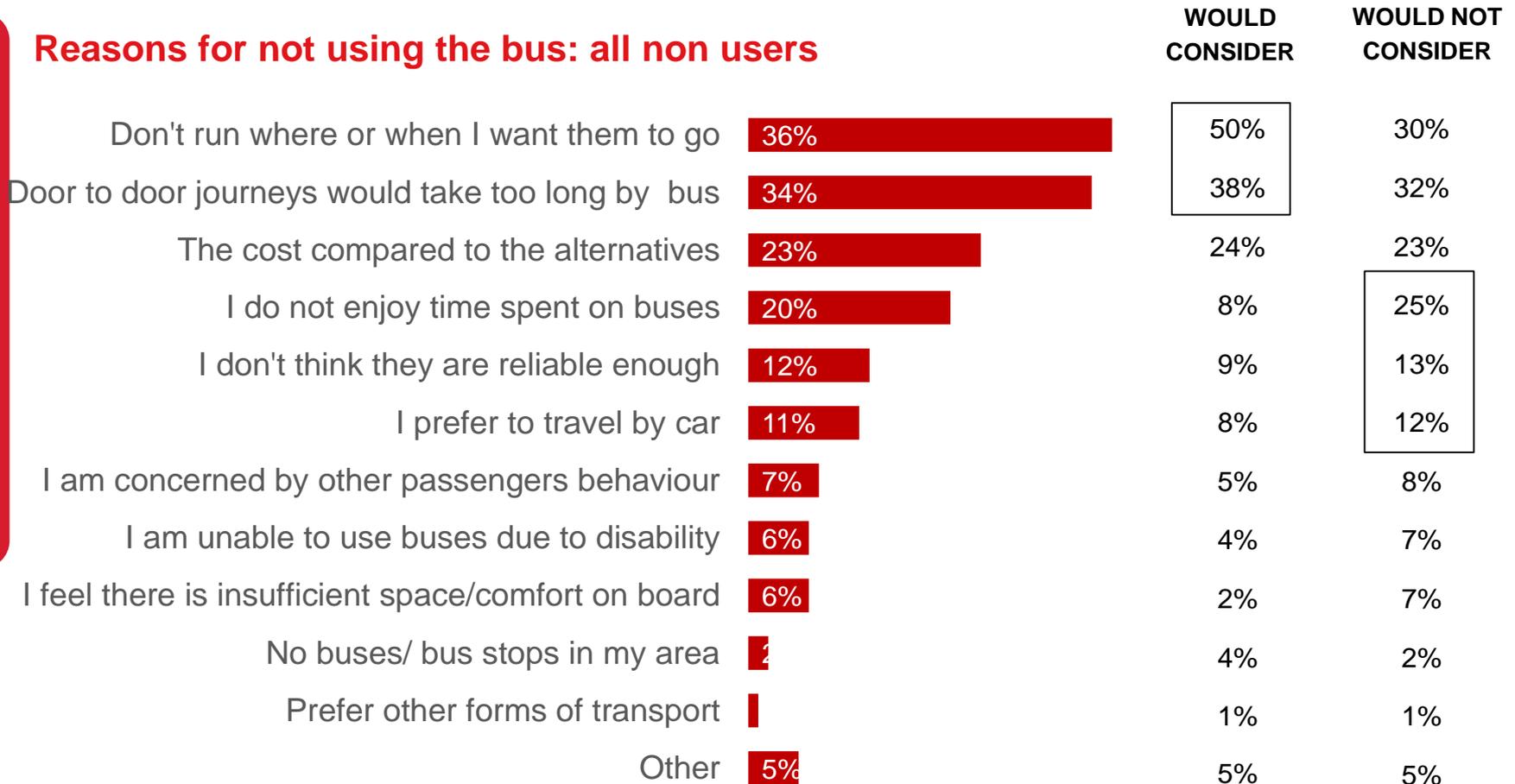
Non users
Consider= 28%
Non-consider= 72%



Q14. To what extent do you agree or disagree with each of the following statements about travelling by bus?
Base: All bus users England Excluding London PTE n=4,664, All Non users England n=2,382

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

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=2,382; all non-users agree 'wouldn't mind making more journeys by bus' n=671 disagree n=1,711



Bus Passenger Survey

Bus Passenger Survey 2015

How satisfied are passengers?

**86% - Overall satisfaction
(England)**

Punctuality - 75%
On bus journey time - 84%
VFM (fare payers) - 63%
Driver helpfulness/attitude - 73%

Satisfaction varies between areas

Overall satisfaction with bus journey – 79% to 94%

Other key findings can vary more - room to improve

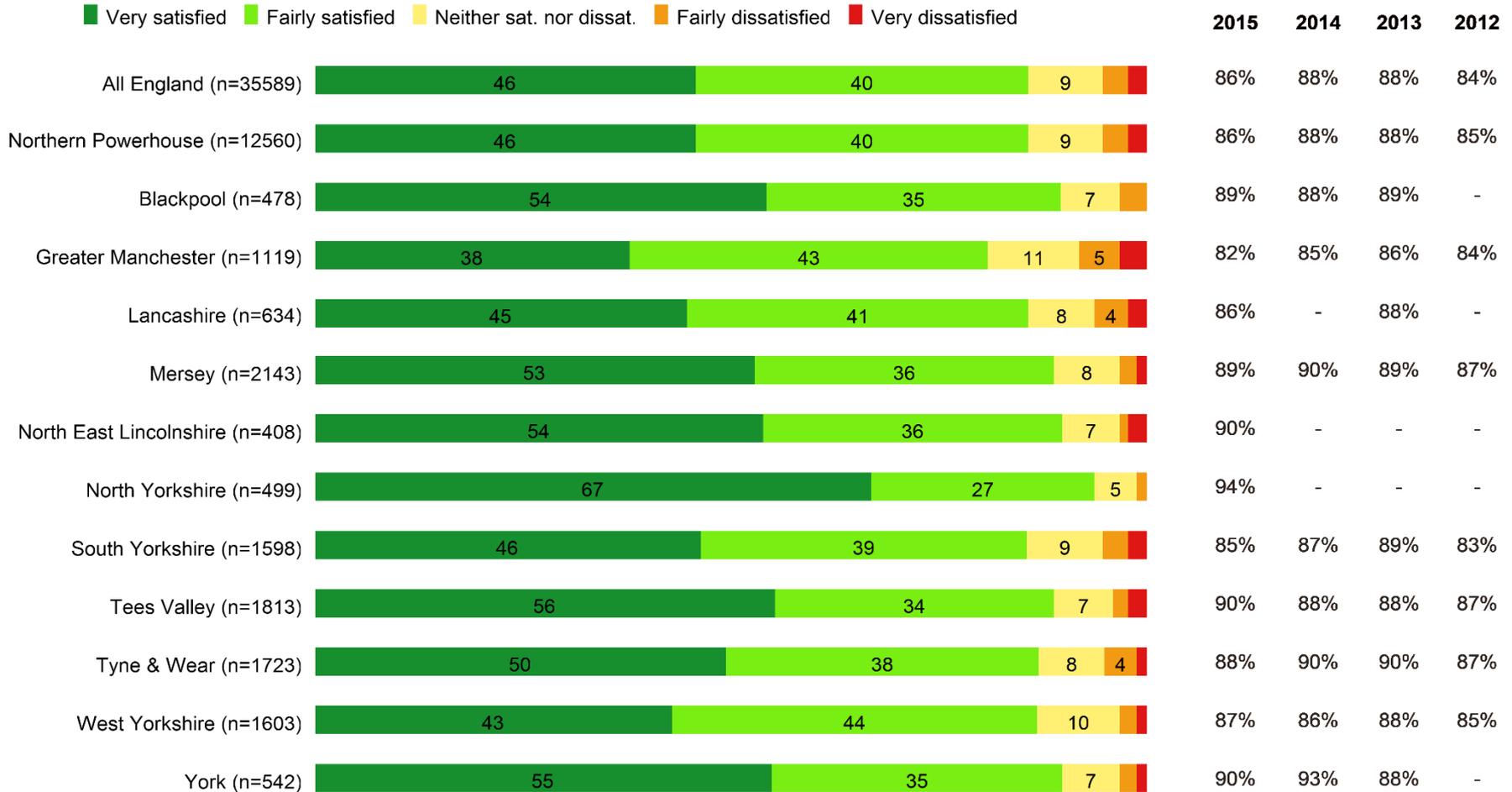
Punctuality - 64% to 84%

Value for money (fare payers) - 41% to 80%

On bus journey time - 78% to 93%

On bus journey time, punctuality (or waiting time), safety of the driving, and value for money are the biggest influences on passengers being satisfied

Overall satisfaction amongst all passengers

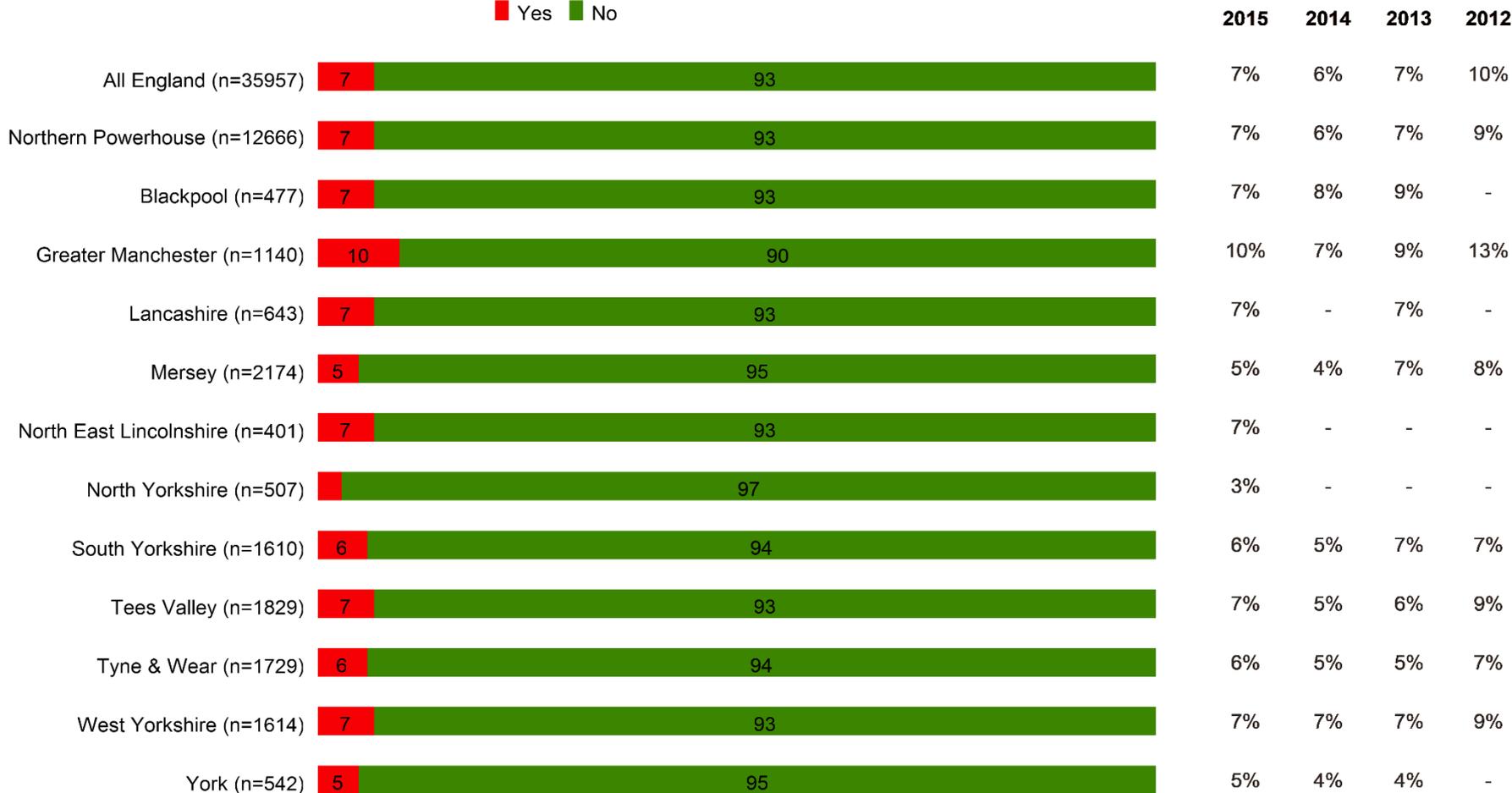


Filter: = England - Year = 2015

Q. Overall, taking everything into account from start to end of the bus journey, how satisfied were you with your bus journey?

Concern over other passengers' behaviour for all passengers

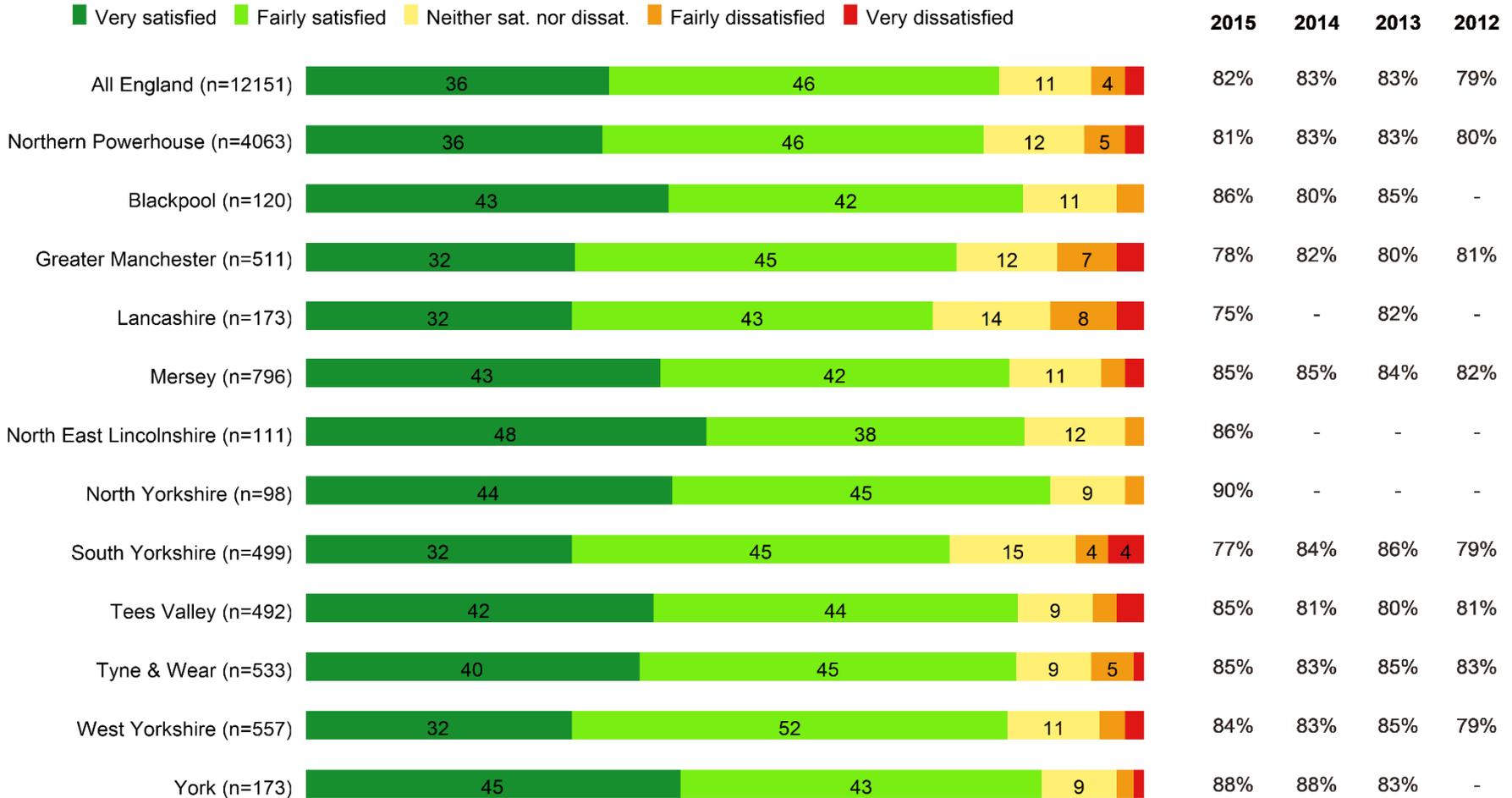
■ Yes ■ No



Filter: = England - Year = 2015

Q. Did other passengers' behaviour give you cause to worry or make you feel uncomfortable during your journey?

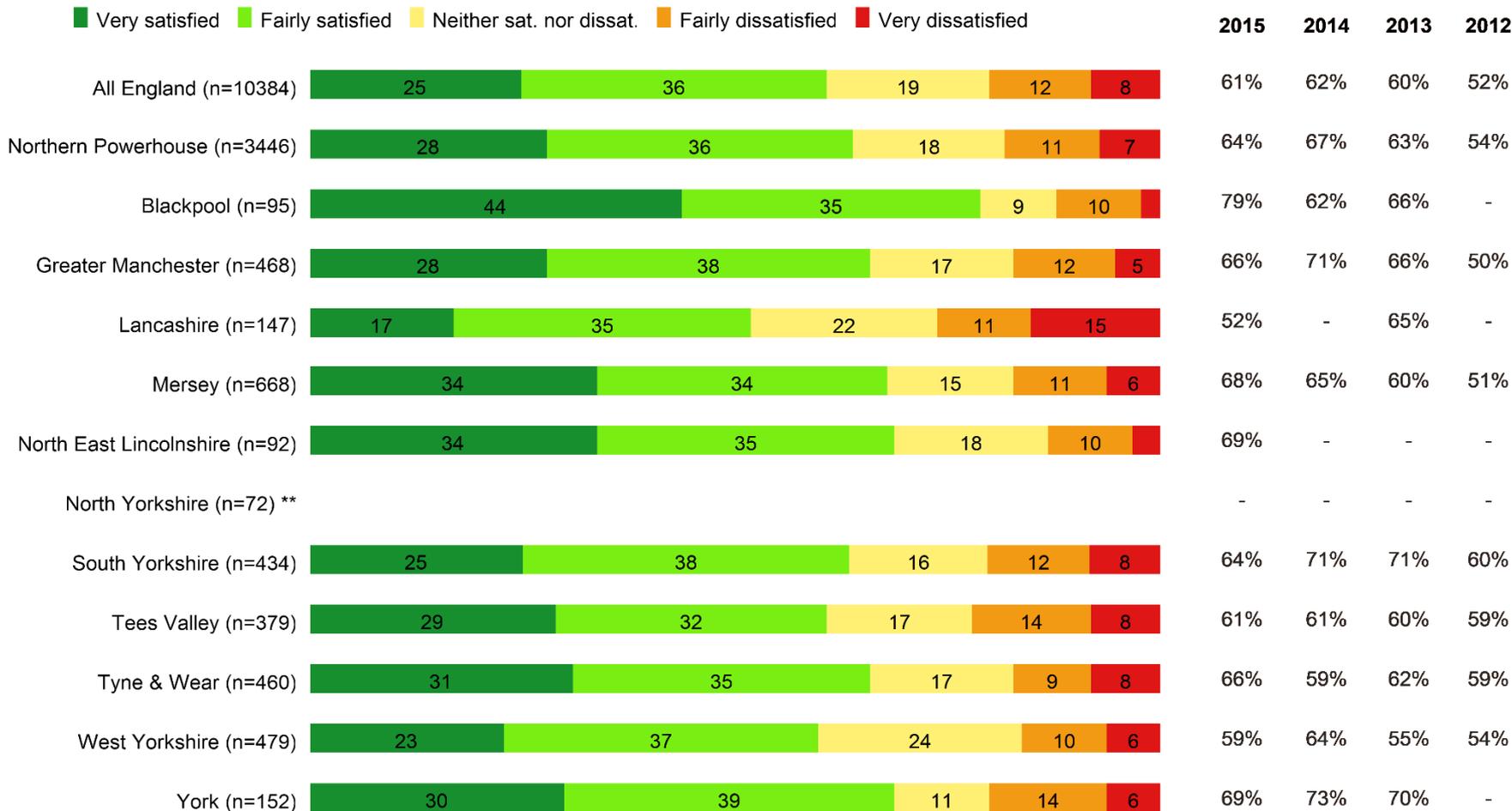
Overall satisfaction amongst commuters



Filter: = England - Year = 2015 - Multi = Commuting

Q. Overall, taking everything into account from start to end of the bus journey, how satisfied were you with your bus journey?

Satisfaction with VFM for fare paying commuters

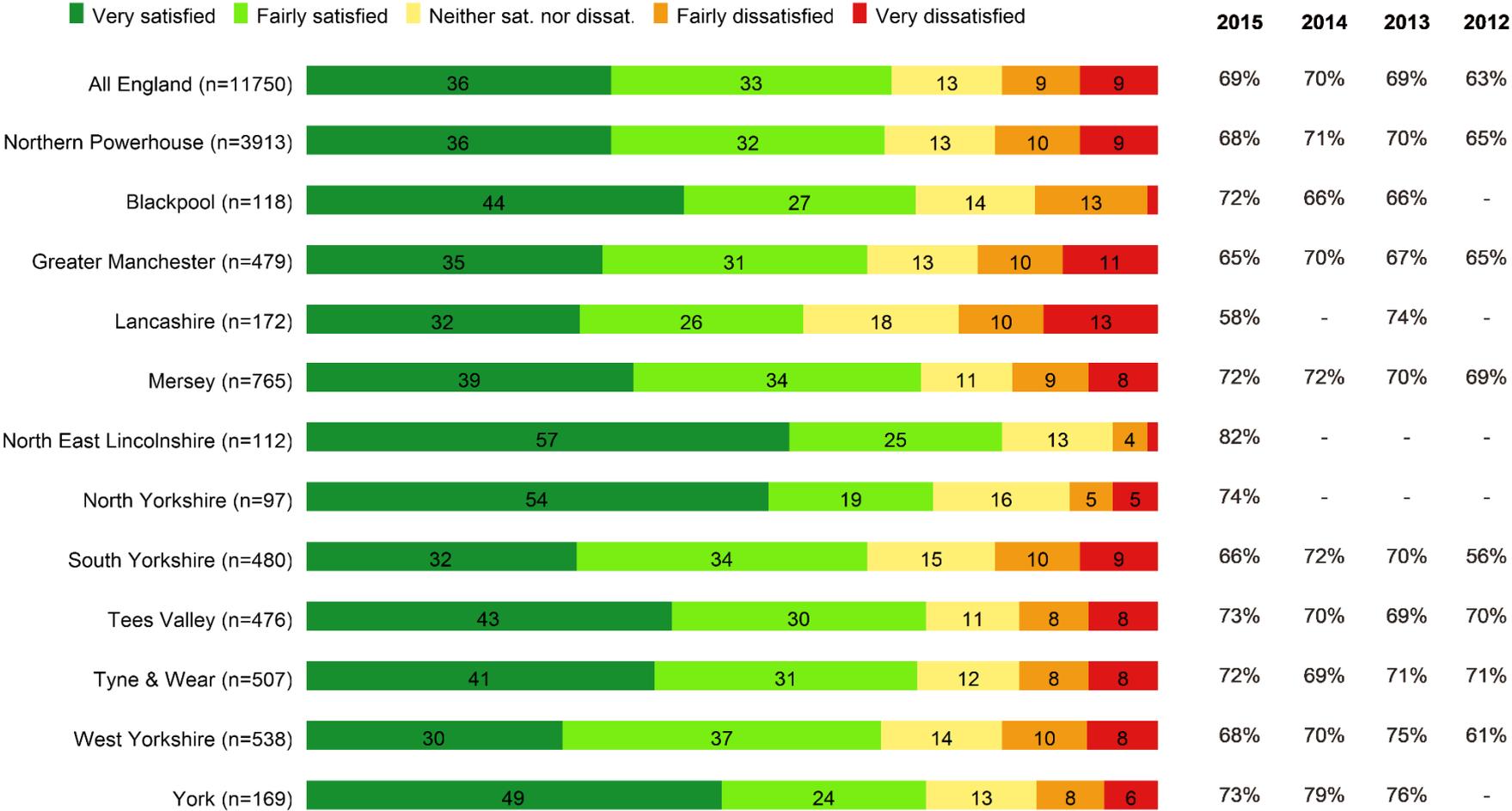


Filter: = England - Year = 2015 - Multi = Commuting

**Response numbers too low

Q. How satisfied were you with the value for money of your journey?

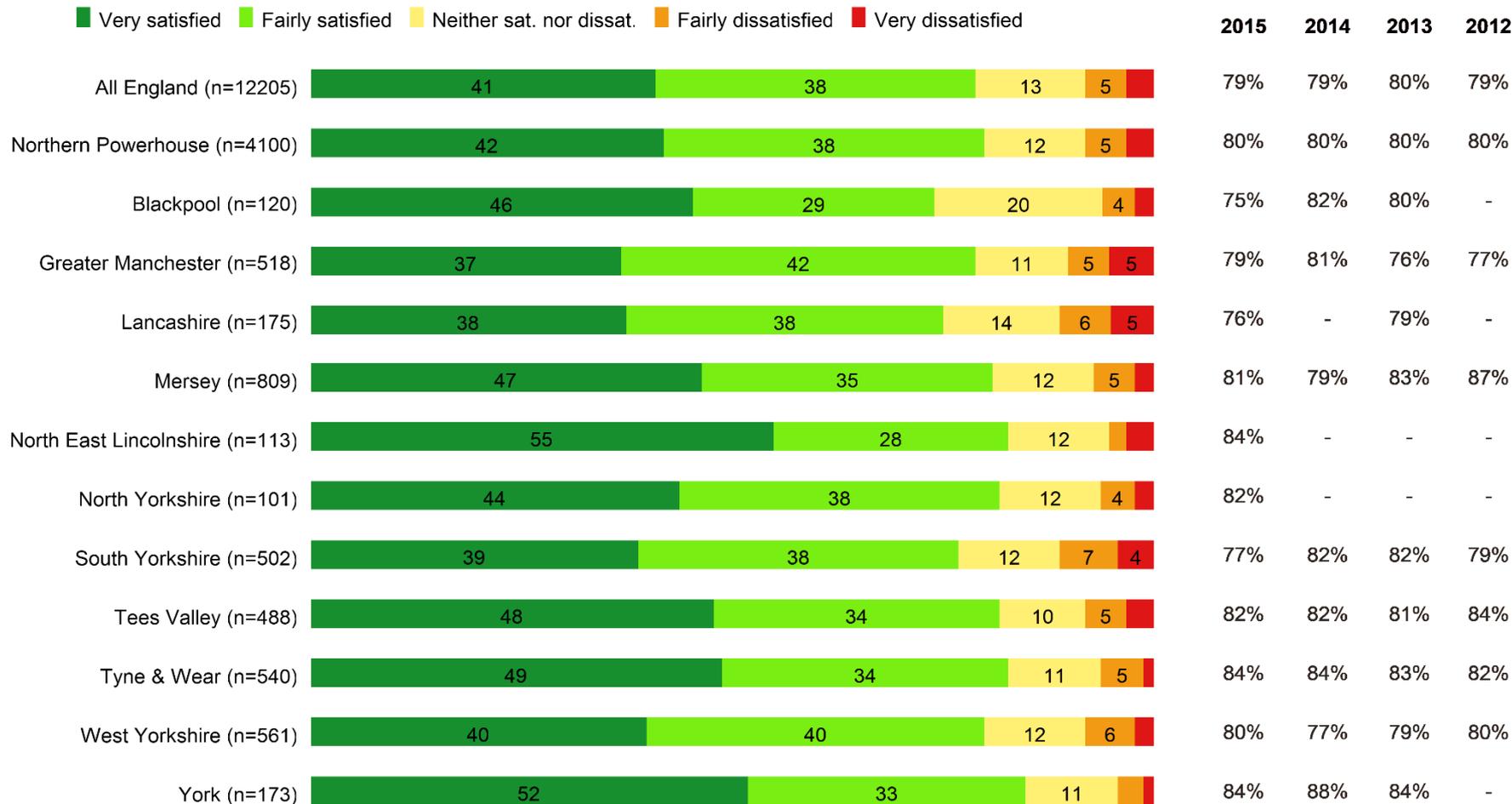
Satisfaction with punctuality amongst commuters



Filter: = England - Year = 2015 - Multi = Commuting

Q. How satisfied were you with the punctuality of the bus?

Satisfaction with on-bus journey time amongst commuters



Filter: = England - Year = 2015 - Multi = Commuting

Q. How satisfied were you with the length of time your journey on the bus took?

Passengers' suggested improvements

The congestion on the way into York I have to leave one and a half hours before I start work. Last week took me over two hours to get in to York. Also please turn the heating off

Punctuality, people on the bus being rowdy and abusive and shouting

If anything could have been improved, it would be the frequency of buses and length of time spent, but I understand that rush hour causes delays

I could find no faults with the journey I had no complaints. I think there have been a lot of improvements

Punctuality of the arrival of the bus, lack of punctuality and low frequency of service are endemic to route, sometimes buses fail to appear at all

Seats need replacing all ripped and dirty where people put their feet on them

For half a mile journey, it cost me £ 1.30 When in my car would not cost me that

Less congestion on the route. Though it was rush hour

Not as many road works in Manchester town centre

Thank you



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David Sidebottom,
Passenger Director,
Transport Focus



Giles Fearnley,
Managing Director,
First UK Bus



Alison Pilling,
Programme Director
(Integrated and Smart
Travel),
Transport for the
North



Stephen Rhodes,
Customer Operations
Director,
Transport for Greater
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Julian Ridge,
Better Bus Area
programme lead,
City of York
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Ask the panel: pollev.com/transfocus

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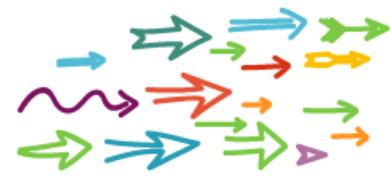


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Stephen Rhodes, Customer Operations Director, Transport for Greater Manchester

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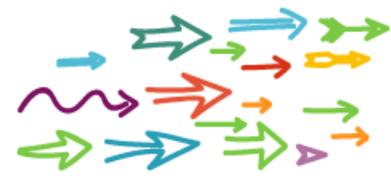
transportfocus 



The Role of Buses in Greater Manchester

Stephen Rhodes

Customer Operations Director



Building a Northern Powerhouse



16m
PEOPLE



7.2 MILLION
JOBS

A more unified economy
would be worth an extra
£1,600 per individual in the
North

Extensive housing growth
potential across the North



WORLD-RENOWNED UNIVERSITIES



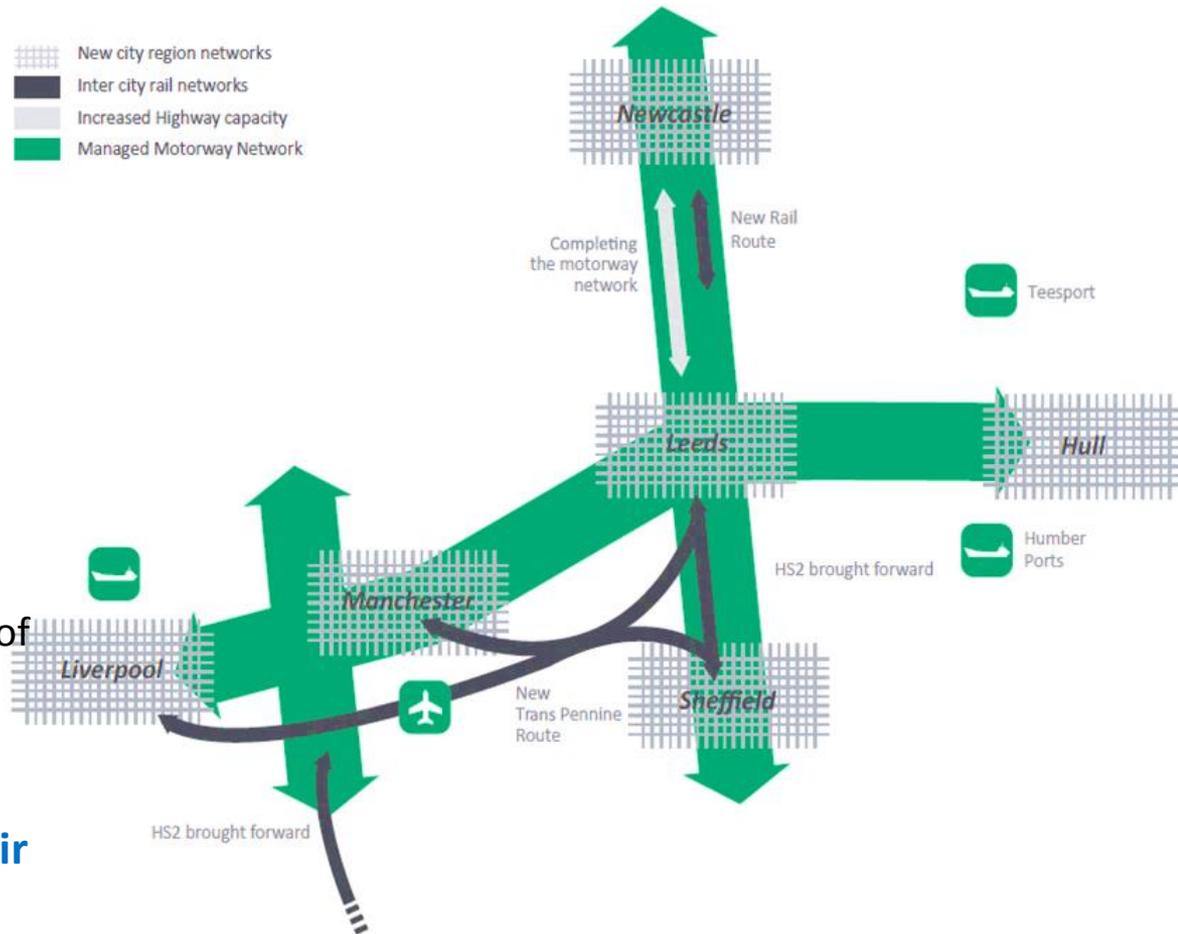
Northern Transport Strategy focusses on:

- Rebalancing growth in different parts of the north
- Adding value to UK plc
- A vision of a super-productive network of modern city regions
- A 20 year investment period

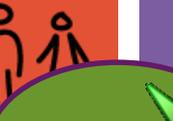
This requires:

- Better transport connections between *and within* economic clusters
- Swifter commuting, allowing businesses to access a wider pool of skills
- Simpler travel information and ticketing

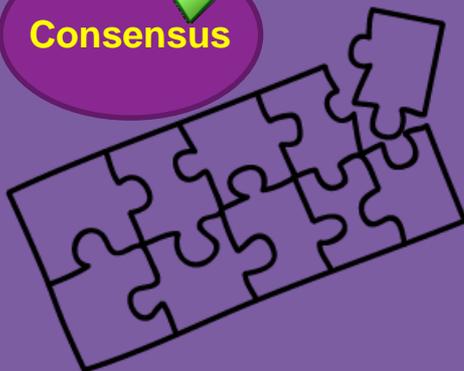
Important that cities enhance their own local transport networks.






**2.7million
residents**


Consensus



10
authorities
working
together


Ambition

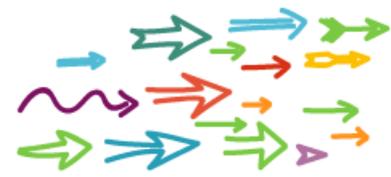

**The heart of
the north**


**UK's first
Combined
Authority**

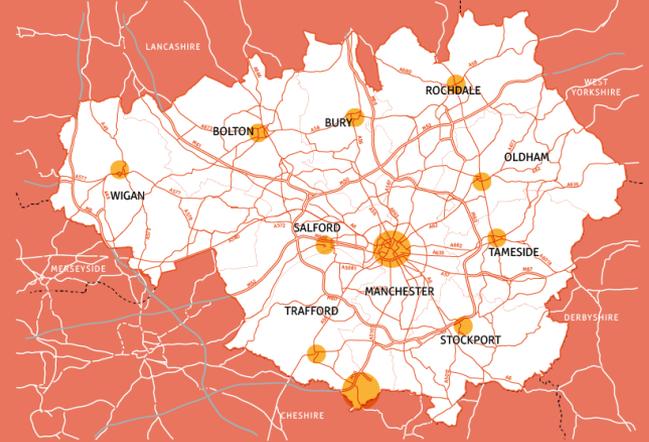

**Centre of innovation,
education, industry
and culture**


**Economic potential
exceeds all other
UK city regions**

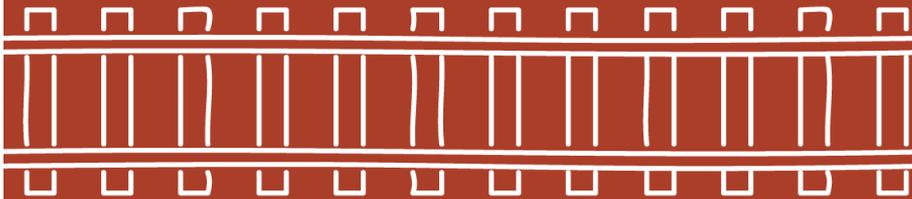




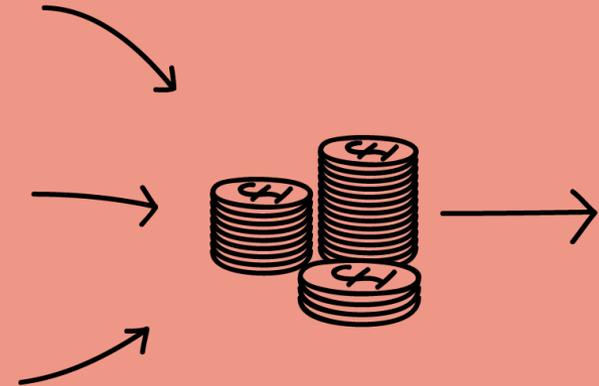
BUS REFORM



KEY ROUTE NETWORK (HIGHWAYS)



RAIL STATIONS



MULTI-YEAR TRANSPORT FUNDING



Effective coordination of Greater Manchester's transport networks will:

- Enable the creation of a truly joined-up transport network
- See the introduction of simple integrated tickets and fares
- Connect people with jobs, education, skills and entertainment
- Support the sustainable economic growth of Greater Manchester
- Help to deliver the aspirations of Transport for the North





Buses - customer satisfaction, priorities and barriers

- High passenger satisfaction to be welcomed.
- But what about those who are not satisfied ... whose expectations are not fulfilled?
- And ex-users ...
- ... and non-users?
- Barriers to bus use act at three levels:
 - How the system works (routes, journey times, frequencies and operating hours, network integration, fares and value for money, punctuality and reliability, etc.)
 - How the system looks and feels (personal security, on-board experience, driver interaction, etc.)
 - How the system reflects identity (“Are buses for people like me?”). Many people have a negative perception of buses/
- Building trust is important at each level.



The Role of Buses in Greater Manchester

Stephen Rhodes

Customer Operations Director



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Giles Fearnley, Managing Director, First UK Bus

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Julian Ridge, Better Bus Area programme lead, City of York Council

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Alison Pilling, Programme Director (Integrated and Smart Travel), Transport for the North

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Transport for the North Integrated and Smart Travel

Alison Pilling
Programme Director

One Agenda, One Economy, One North



What do passengers want?



What do passengers want?

Value for money

Reliability

Punctuality

...

Address congestion

Reduce boarding times

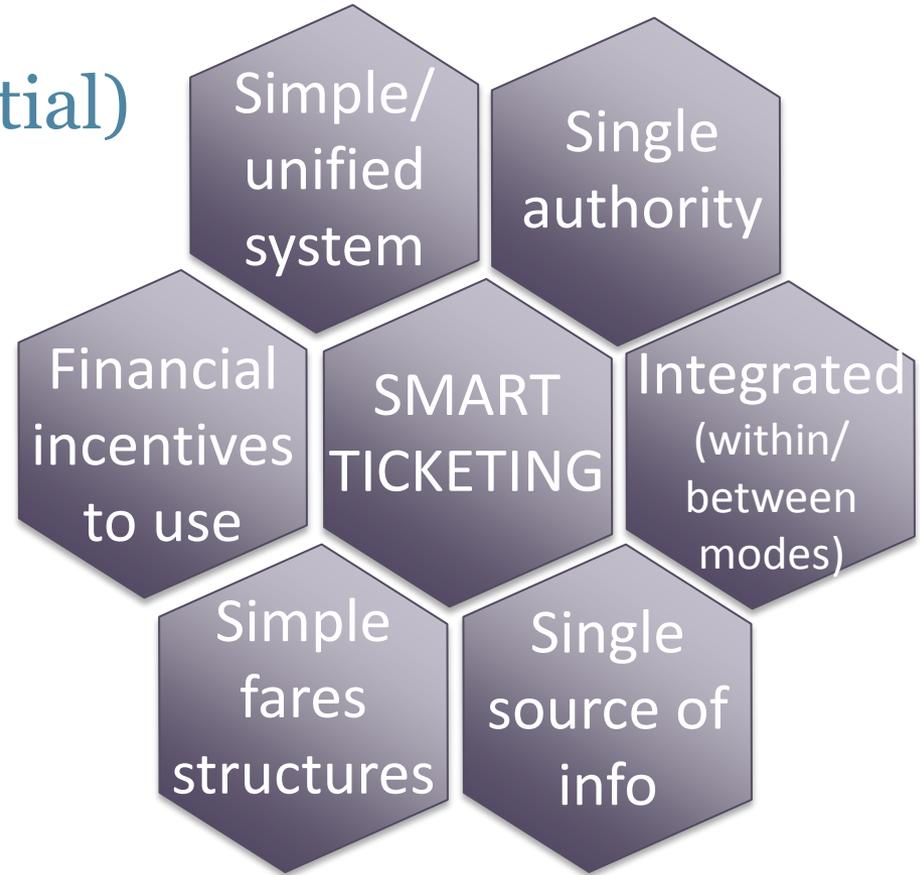
(And is it also what ex-passengers or potential new passengers want...?)

What do passengers want?

Oyster!



What do (existing and potential) passengers want?



What does this mean for the bus?

TfN Spring Report has a strong focus on rail and road but...

- It's about the economy – what problem are we trying to solve?
- Connectivity is multi-modal
- Key is - simple to understand, simple to use, simple to pay

TfN Integrated and Smart Travel offer

Customers will be able to:

- Travel by any mode
- Get a 'fair price promise'
- Pay in advance or on the day, and if they choose, by setting up an account
- Use the medium that suits them (smart card, contactless bank card, phone acting as one of these, bar code)
- Find relevant information and be supported every step of the way

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The panel



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