



Bus Passenger Satisfaction Survey

Annual report for 2010/2011 and
quarterly results for quarter 1 2011

Passenger Focus research

In February 2010 Passenger Focus's remit was extended to include bus, coach and tram passenger representation in England, outside London. This was in addition to the watchdog's existing role of representing Britain's rail passengers.

Bus Passenger Satisfaction Survey

The Bus Passenger Satisfaction Survey (BPSS) has been in existence since April 2000, following the announcement by Government at the bus summit in November 1999 that it would carry out regular surveys to monitor user perceptions of local bus services. In April 2010 Passenger Focus assumed responsibility from the Department for Transport for the survey.

This is a survey to monitor and record passenger satisfaction with local bus services. Interviews are conducted with a minimum of 2,800 respondents per quarter (over 11,000 passengers per year) at bus stops and stations across England (excluding London). Passengers are asked to rate their satisfaction with several aspects of the journey they have just undertaken, including the bus stop environment and 'on the bus' factors, as well as giving a rating of their overall experience of using the bus. The BPSS questionnaire is four A4 pages in length and takes five minutes to complete.

The results are representative of typical patterns of bus usage, by day of week and time of day. The survey provides a reliable measure of bus passenger satisfaction at a national and regional level.

The BPSS sits within a suite of passenger research. The results are published widely and made accessible and useful to the bus industry.

Methodology

Passengers are approached by an interviewer at the point when they alight from the bus at bus stations/stops. A short screening questionnaire is administered to ensure they are eligible to participate in the survey, and if they are, the full questionnaire is administered face-to-face. The survey is conducted at 198 fixed sampling points (bus stations or stops) across England outside London.

This report presents the annual results for 2010/11 compared with the previous year and also reports on changes in the most recent January – March quarter compared to the previous October – December quarter. The most recent quarter was conducted between 22 January and 18 February 2011.

The key driver analysis showing the influence of different service aspects on overall satisfaction is appended to this report.

A technical annex is available as a separate document.

The table below shows the number of interviews achieved across 2010/11.

Number of Interviews Achieved

	Interviews Achieved				
	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Total
England (excluding London)	3048	3208	3087	2990	12333
Metropolitan	1372	1455	1426	1417	5670
Shires	1676	1753	1661	1573	6663

Executive Summary

This report presents the results of the BPSS for 2010/11 as a whole, and for quarter 1 2011.

The annual overall service satisfaction score (85 out of 100) was significantly lower than in 2009/10 (down two points).

Looking at the levels of satisfaction for each individual aspect of the journey, scores have fallen across 16 out of the 21 journey aspects rated. The deterioration has been most evident on two aspects:

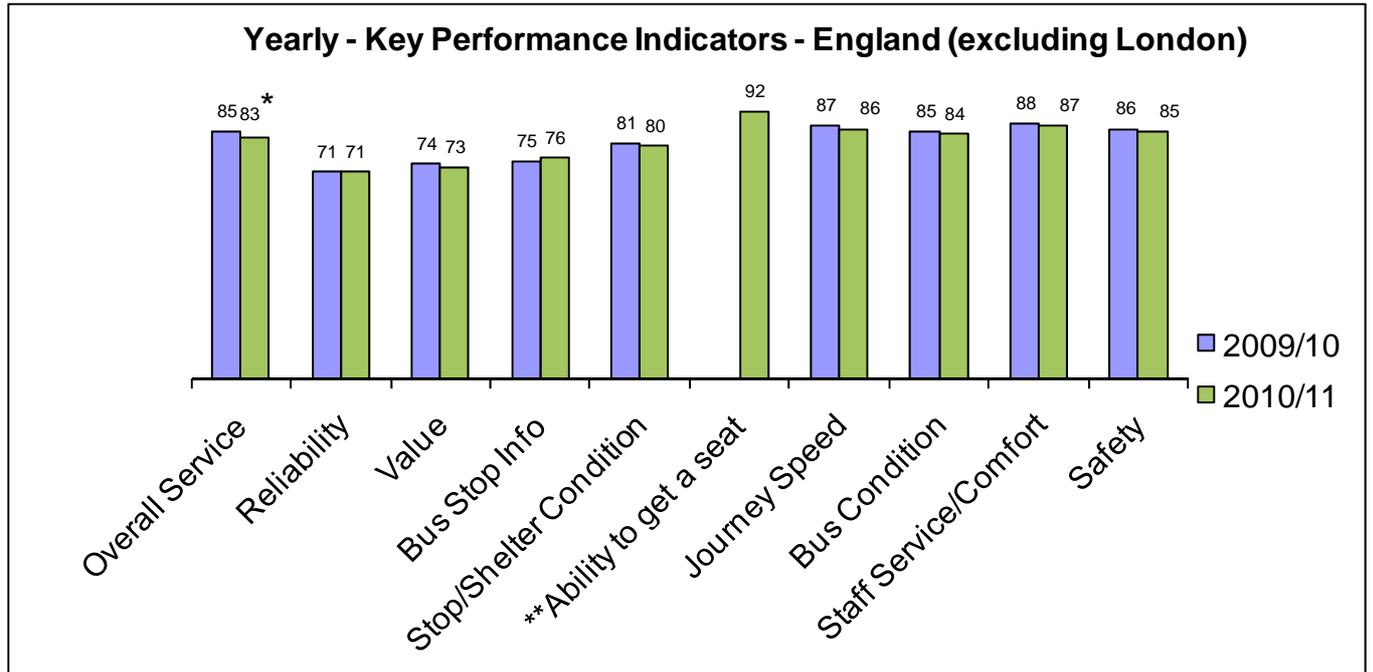
- Exterior cleanliness of the bus (down two points, with a six point drop among passengers in the North West)
- Information on the exterior of the bus (down two points overall, with the largest fall amongst passengers in the South West, the North West and Yorkshire & Humberside, and amongst 60+ year-old passengers)

Across the year as a whole, passengers in the Shires were significantly more satisfied with bus services than those travelling in Metropolitan areas, particularly with the interior cleanliness of the bus and reliability of the bus. However, passengers in the Metropolitan areas were more satisfied with information at the bus stop. Satisfaction with this aspect is obviously driven by the facilities present at the boarding bus stop (lighting, route map, timetable, and availability of a mobile phone code to check the arrival of the next bus), and lower satisfaction in the Shires is due to there being a higher incidence of bus stops with none of these facilities.

A common theme that has emerged in analysis of the annual results is a fall in satisfaction ratings among two passenger groups who historically have been the most satisfied with their bus journey:

- North West passengers - all bar two of the 21 journey aspects rated were significantly lower in 2010/11 compared with the previous year
- 60+ year olds - significantly less satisfied with 17 out of the 21 aspects of their journey in 2010/11

The graph below shows ratings on the key performance indicators across England (excluding London) for 2010/11 compared with the previous year.



*Significant decrease year-on-year (YOY)

**Not asked in 2009/10

In the most recent quarter the score for overall satisfaction showed some signs of recovery, with a two point rise since the previous quarter to 83 out of 100. This was driven by a significant rise in the Shires, where the score rose by four points. However, the overall score remains one point lower than in the same quarter of the previous year.

The scores for reliability also improved this quarter in both Metropolitan and Shire areas (to 67 out of 100 and 71 out of 100 respectively), giving an overall score of 69 out of 100, which is the same level as during the previous year.

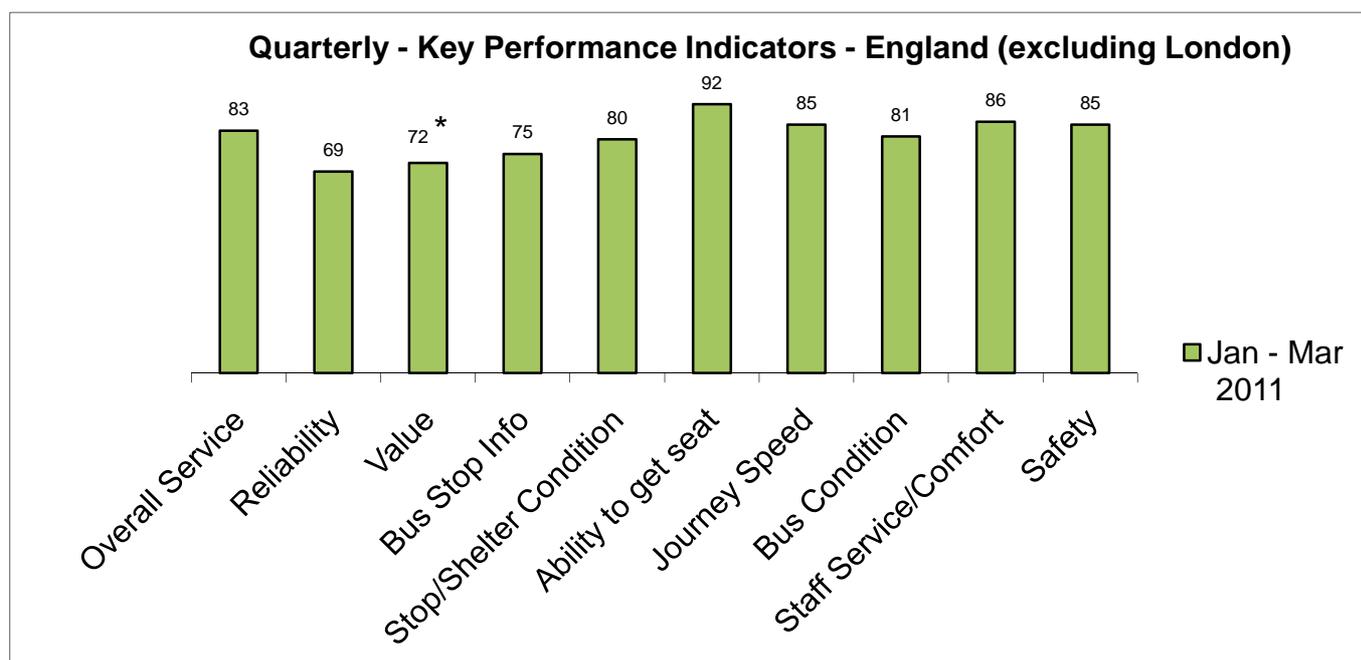
There was also a two point rise in satisfaction with safety, but the score (85 out of 100) remains below that of the same quarter last year.

Three measures fell noticeably this quarter. Satisfaction with bus condition was rated at 81 out of 100, which is three points down on both the previous quarter and the same quarter last year.

Satisfaction with value for money fell by two points to 72 out of 100, a score significantly lower than that at the same time last year. The fall in satisfaction was particularly marked in Metropolitan areas.

Staff service/comfort also fell, to 86 out of 100, which is a decline of one point since the previous wave of research, and two points down on the same quarter last year.

The graph below shows the key performance indicators across England (excluding London) for the wave conducted January – March 2011



The following sections of this report deal with each of the key performance indicators in detail.

Overall Service

“Thinking of the journey you have just made, starting at the bus stop, how satisfied are you with the overall service you received today?”

Looking at the 2010/11 year as a whole, the overall service satisfaction score (85 out of 100) was significantly lower compared with the previous year.

The drop in satisfaction was evident across both Metropolitan and Shires areas. Analysis by individual region reveals that passengers in East Anglia, South East, West Midlands and North West were significantly less satisfied compared with the previous year, whilst satisfaction improved significantly among passengers in the North East who were the most satisfied in 2010/11, together with those in East Midlands (both at 86 out of 100).

The drop was also evident across all age groups except for 45-59 year olds. The fall was most significant among 16-24 year olds (78, down three points).

Yearly - Overall Service			
	2009/10	2010/11	Change from last year
Base size (unweighted)	12195	12333	
England (excl. London)	85	83	-2*
Metropolitan	84	83	-1*
Shires	85	84	-1*

*significant decrease year-on-year (YOY)

Whilst the overall trend was down year-on-year, the picture in the most recent quarter was more positive, with a two point increase in satisfaction back up to a score of 83 out of 100. Satisfaction in the Shires rebounded most notably, up four points to 85.

Quarterly - Overall Service			
	January - March	Change from previous quarter	Change from same quarter last year
Base size (unweighted)	2990		
England (excl. London)	83	+2*	-1
Metropolitan	82	0	-1
Shires	85**	+4*	0

* significantly higher

** significantly higher than Metropolitan areas

Reliability

We measure perceptions of the general reliability of the service as follows: “Thinking about this and recent journeys, how satisfied are you with the reliability of buses being on time?”

Reliability, which is the second most important influence on overall satisfaction, continues to have the lowest score of any key performance indicator. There has been no change in reliability ratings year-on-year, although satisfaction fell among 16-24 year olds who have historically been the least satisfied with this aspect of service (64 out of 100).

As last year, passengers in the Shires were significantly more satisfied with the reliability of buses compared with those in Metropolitan areas.

Yearly - Reliability			
	2009/10	2010/11	Change from last year
Base size (unweighted)	12195	12333	
England (excl. London)	71	71	0
Metropolitan	69	68	1
Shires	73	73**	0

**significantly higher than Metropolitan

Reliability ratings in the most recent quarter were slightly improved from the previous quarter (due to an uplift in Metropolitan areas), although unchanged from the corresponding period in the previous year.

Quarterly - Reliability			
	January - March	Change from previous quarter	Change from same quarter last year
Base size (unweighted)	2990		
England (excl. London)	69	+1	0
Metropolitan	67	+2*	0
Shires	71**	+1	0

*significantly higher

**significantly higher than Metropolitan

Value for money

“How satisfied are you with the bus journey you made today in terms of value for money?”

Value for money is the fourth most important influence on satisfaction with the overall service, but continues to be the second lowest scoring key performance indicator. Comparing results year-on-year, there was a marginal decline in perceptions of value for money, although not statistically significant.

Yearly - Value for money			
	2009/10	2010/11	Change from last year
Base size (unweighted)	12195	12333	
England (excl. London)	74	73	-1
Metropolitan	74	73	-1
Shires	73	73	0

Looking at results in the most recent quarter, there was a significant decline and ratings were at a lower level than in the corresponding period from the previous year. This deterioration was most evident among younger passengers (16-24 year olds, down four points to 69; and 25-44 year olds, down five points to 72) as well as those travelling in Metropolitan areas (down three points to 71).

Quarterly - Value for money			
	January - March	Change from previous quarter	Change from same quarter last year
Base size (unweighted)	1753		
England (excl. London)	72	-2	-2*
Metropolitan	71	-2	-3*
Shires	73	-1	-1

*significantly lower

Please note – value for money ratings exclude concessionary passengers

Bus stop information

“How satisfied were you with the information supplied at the bus stop?”

Satisfaction with Bus Stop Information, at 76 out of 100 for 2010/11 as a whole, has increased marginally compared with last year, but was still the third lowest key performance indicator.

As to be expected, satisfaction with the information at bus stop varied according to the facilities provided – lighting, route map, timetable and whether there was a mobile phone code to check the arrival of the next bus. Satisfaction was lowest among passengers who boarded the bus at a stop with none of these facilities. There is a higher incidence of bus stops with no facilities in the Shires (17%) compared with the Metropolitan areas (12%), and as a result, passengers in the Metropolitan areas were significantly more satisfied with the information provided (four points higher).

Satisfaction with the information at bus stop was highest among those who boarded the bus at a stop that had a route map (86 out of 100) followed by stops with lighting and those with a mobile code to check the time of the next bus (both at 83 out of 100).

At an annual level, there was a significant increase in the West Midlands and Yorkshire & Humberside satisfaction ratings. However, in the North West, there was a two point drop compared with last year, although at 79 out of 100 the rating was still higher than the average England figure (76).

Yearly - Bus stop information			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (Excl London)	75	76	+1
Metropolitan	77	78**	+1*
Shires	74	74	0

*significantly higher

**significantly higher than Shires

Satisfaction ratings in the most recent quarter were broadly in line with those reported previously, with no significant changes.

Quarterly - Bus stop information			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (Excl London)	75	-1	0
Metropolitan	78**	0	+1
Shires	73	-1	0

**significantly higher than Shires

The condition of the stop/shelter

This is a composite measure based on an average of three scores (the individual scores for each aspect in 2010/11 are shown in brackets):

“How satisfied are you with:

- **The freedom from litter** (79)
- **The cleanliness & freedom from graffiti at the bus stop** (81)
- **The state of repair at the bus stop”** (81)

The three aspects that make up this composite measure are the least important influences on satisfaction with overall service.

Across England as a whole, satisfaction with the condition of the stop/shelter, rated at 80 out of 100, has dropped marginally compared to the previous year, although the decline is not significant.

Although passengers in the North West rated the highest on all three aspects within the composite measure, they were significantly less satisfied with each compared to last year.

Yearly - Stop/shelter condition			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (Excl London)	81	80	-1
Metropolitan	80	80	0
Shires	81	81	0

There were no significant changes looking at results in the most recent quarter.

- **The freedom from litter** (79)
- **The cleanliness & freedom from graffiti at the bus stop** (81)
- **The state of repair at the bus stop** (81)

Quarterly - Stop/shelter condition			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (Excl London)	80	0	-1
Metropolitan	80	0	0
Shires	80	0	0

Ability to get a seat

“How satisfied are you with being able to get a seat?” (on the bus you have just got off)

This question was introduced at the start of 2010/11 and has been consistently the highest rated key performance indicator. However, it is not among the more important influences on satisfaction with overall service.

Passengers in the Shires were significantly more satisfied with the ability to get a seat than those in Metropolitan areas. Looking at results regionally, passengers in West Midlands were significantly less satisfied with their ability to get a seat (89 out of 100), whilst those in North West region were the most satisfied (94 out of 100).

Yearly - Ability to get a seat	
	2010/11
Base size (unweighted)	12333
England (Excl London)	92
Metropolitan	91
Shires	93**

**significantly higher than Metropolitan

Please note – this question was introduced in 2010/11, so there is no data for previous years

Satisfaction with this aspect of the journey has remained unchanged in the most recent quarter.

Quarterly - Ability to get a seat			
	January - March	Change from previous quarter	Change from same quarter last year
Base size (unweighted)	2990		
England (Excl London)	92	0	N/A
Metropolitan	92	+1	N/A
Shires	92	0	N/A

Journey Speed

This is a composite measure based on an average of two scores (2010/11 individual aspect scores shown in brackets):

How satisfied are you with:

- **The length of time you waited for the bus you just got off** (83)
- **The length of time your journey took?"** (89)

The length of time waited for the bus is the most important influence on satisfaction with the overall service, whilst journey time is the fifth most important influence.

In England as a whole, satisfaction with journey speed, although still fairly high at 86 out of 100, has dropped marginally compared with last year.

There were no rating differences between the Metropolitan and Shire areas, although passengers in East Anglia and the West Midlands were the least satisfied with the journey speed (both at 83 out of 100). In contrast, satisfaction with journey speed was highest in the East Midlands, North East and North West (all at 88 out of 100).

Younger passengers (16-24 year olds) tended to be less satisfied with journey speed which corresponds with a lower rating among those travelling to and from school/college (both customer groups rating 82 out of 100).

It is worth noting that satisfaction level for time waited and journey time has dropped significantly year-on-year among two customer groups who were previously highly satisfied: those in the North West (down two points and three points on each aspect respectively) and among passengers aged 60+ (down one point on each aspect).

Yearly - Journey speed			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (excl. London)	87	86	-1
Metropolitan	87	86	-1
Shires	87	86	-1

In the most recent quarter, satisfaction with journey speed remained largely unchanged.

- *The length of time you waited for the bus you just got off* (82)

- *The length of time your journey took?"* (89)

Quarterly - Journey speed			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (excl. London)	85	0	-1
Metropolitan	85	0	-2
Shires	86	+2	-1

Bus condition

This is a composite measured based on the average of six scores (2010/11 individual aspect scores shown in brackets):

“How satisfied are you with:

- **Cleanliness and freedom from graffiti of the outside of the bus** (85)
- **The state of repair of the outside of the bus** (86)
- **The information provided on the outside of the bus** (86)
- **The cleanliness and freedom from litter of the inside of the bus** (82)
- **The state of repair of the inside of the bus** (85)
- **The notices and information provided inside of the bus”** (82)

Across England as a whole, satisfaction with bus condition has dropped by one point year-on-year, to 84 out of 100.

The deterioration was mainly due to changes in the North West. Although passengers in the North West were previously among the most satisfied with their bus journey, there have been significant drops on all six measures in this region in 2010/11: notably exterior cleanliness and interior information (both down four points), exterior condition and information and interior cleanliness (all down by three points).

In addition, worse year-on-year ratings were evident among passengers aged 60+ years (who historically have been more satisfied with all aspects of their bus journey). There has been a two point drop in cleanliness and information – both exterior and interior – among these older bus passengers.

Yearly - Bus condition			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (Excl London)	85	84	-1
Metropolitan	85	83	-2
Shires	86	85	-1

Looking at the most recent quarterly results, satisfaction with bus condition has fallen (not significantly) compared with the previous wave and the same period last year. The deterioration has been most evident in ratings of exterior cleanliness which, at 81 out of 100, is three points lower than in the same period last year and five points lower than last quarter.

- *Cleanliness and freedom from graffiti of the outside of the bus* (81)
- *The state of repair of the outside of the bus* (84)
- *The information provided on the outside of the bus* (84)
- *The cleanliness and freedom from litter of the inside of the bus* (81)
- *The state of repair of the inside of the bus* (84)
- *The notices and information provided inside of the bus* (80)

Quarterly - Bus condition			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (Excl London)	81	-3	-3
Metropolitan	81	-2	-3
Shires	82	-3	-3

Staff service/comfort

This is a composite measure based on an average of four scores (2010/11 individual aspect scores shown in brackets):

How satisfied are you with:

- **Your comfort inside the bus** (84)
- **The ease of getting on and off the bus** (90)
- **The driver/conductor's behaviour and attitude towards you** (90)
- **The smoothness and freedom from jolting during the journey** (83)

Satisfaction with staff service/comfort has dropped marginally (by one point) compared with last year. This fall was evident across all four aspects that contribute to the composite.

Two of the aspects within the staff service/comfort composite are important influences on satisfaction with overall service: 'comfort inside the bus' is the third most important and 'driver behaviour/attitude' the sixth most important aspect.

Satisfaction with staff service/comfort continued to be slightly higher in the Shires than in Metropolitan areas in 2010/11. Passengers in the West Midlands were the least satisfied (84 out of 100), whilst those in East Midlands and North West were the most satisfied (both at 89 out of 100). However, in the North West region, satisfaction with all four service aspects within the composite deteriorated significantly, in particular comfort inside the bus and smoothness of ride which have both dropped four points compared with last year.

Satisfaction with three of the four aspects has also dropped among 25-44 year olds: interior comfort, driver's behaviour and smoothness of ride (all dropped by two points among this age group).

Yearly - Staff Service/Comfort			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (excl. London)	88	87	-1
Metropolitan	87	86	-1
Shires	88	87	-1

Looking at the quarterly results, ratings have dropped slightly in the most recent quarter, and satisfaction with comfort and smoothness of ride have both dropped significantly compared with the same period last year.

- **Your comfort inside the bus** (83)
- **The ease of getting on and off the bus** (90)
- **The driver/conductor's behaviour and attitude towards you** (89)
- **The smoothness and freedom from jolting during the journey** (82)

Quarterly - Staff service/comfort			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (excl. London)	86	-1	-2
Metropolitan	86	0	-1
Shires	86	-1	-2

Safety

This is a composite measure based on the average of two scores (2010/11 individual aspect scores shown in brackets):

“How satisfied are you with:

- Your feeling of personal safety at the bus stop (82)

- Your feeling of personal safety during the journey” (91)

Satisfaction with Safety, although still fairly high at 85 out of 100, fell by one point in 2010/11 compared with last year, and this decline is evident for both at bus stop and on-bus safety ratings.

It is noteworthy that safety at bus stop, the seventh most important influence on overall satisfaction, is nine points lower than satisfaction with on-bus safety, the ninth most important influence.

Passengers in the West Midlands region were the least satisfied with Safety in 2010/11 (82 out of 100), scoring only 78 out of 100 for safety at bus stop (and 88 for on-bus safety).

Passengers in the North East and North West were the most satisfied with safety. However, while in the North East satisfaction with on-bus safety has increased by two points compared with last year (up to 92); satisfaction with both safety aspects has dropped significantly in North West (safety at bus stop at 83 is down three points and on-bus safety at 92 is down two points).

Yearly - Safety			
	2009/10	2010/11	<i>Change from last year</i>
Base size (unweighted)	12195	12333	
England (Excl London)	86	85	-1
Metropolitan	86	85	-1
Shires	86	86	0

Looking at the most recent quarterly results, while satisfaction with safety has improved compared to the quarter, across England and in both Metropolitan and Shires, there has been a decline compared with the same quarter last year, especially in the Metropolitan areas (down two points).

- **Your feeling of personal safety at the bus stop** (81)

- **Your feeling of personal safety during the journey** (89)

Quarterly - Safety			
	January - March	<i>Change from previous quarter</i>	<i>Change from same quarter last year</i>
Base size (unweighted)	2990		
England (Excl London)	85	+1	-1
Metropolitan	84	+1	-2
Shires	85	+1	-1

APPENDIX A

Key influencers of overall satisfaction

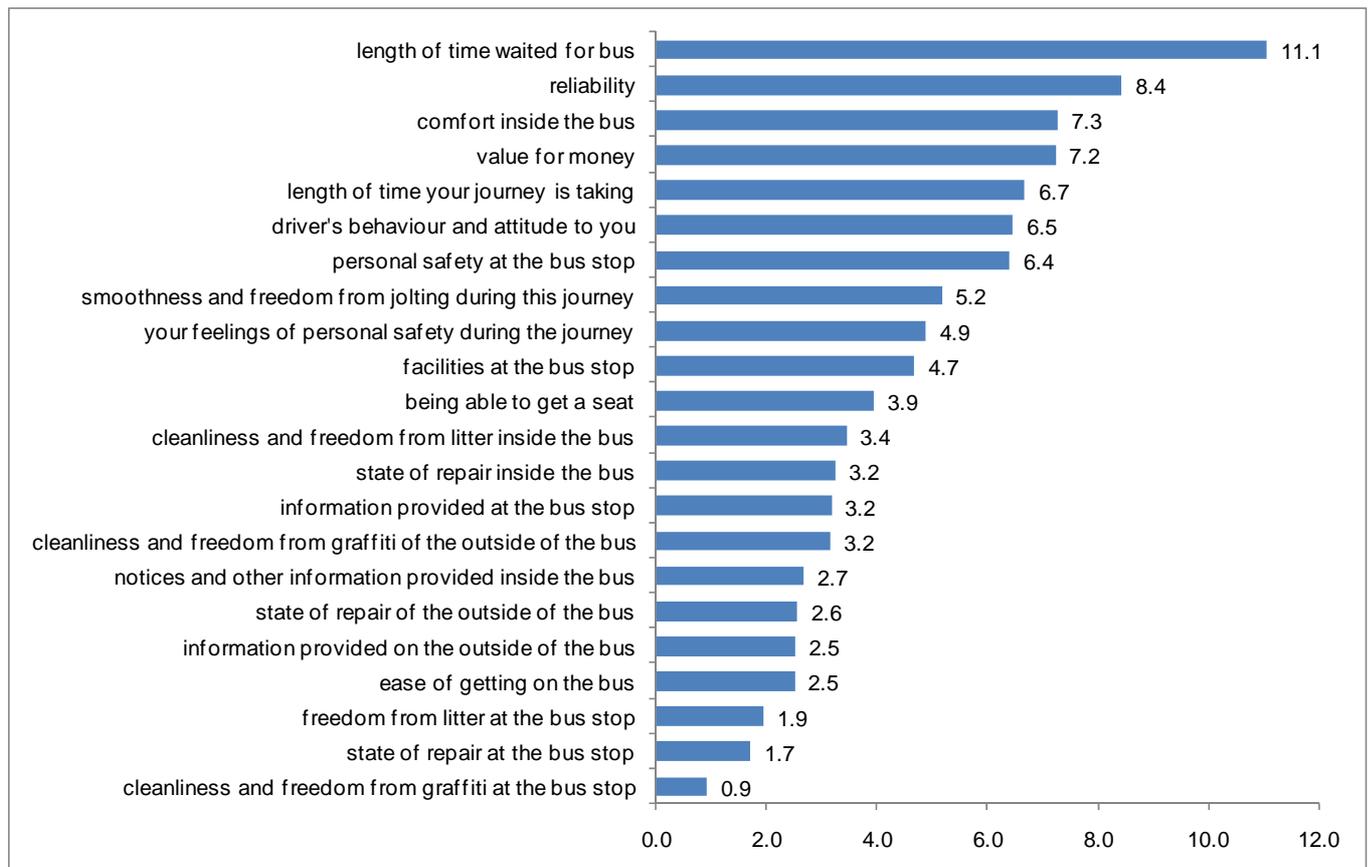
Key influencers of overall satisfaction

Using a data modelling technique, we have derived the importance of the various service areas to the passenger. The analysis involves looking at the satisfaction scores for each individual attribute that goes into the KPIs and seeing how they correspond with the passengers' satisfaction with the overall service.

We have used a technique called ridge regression analysis to assess this relationship. Thus we can calculate derived importance scores for each service feature; the higher the percentage the more important the area in driving satisfaction with the overall service.

The graph below shows how important each aspect is in determining the overall satisfaction with the service.

Key influencers of overall satisfaction



Priorities for improvement

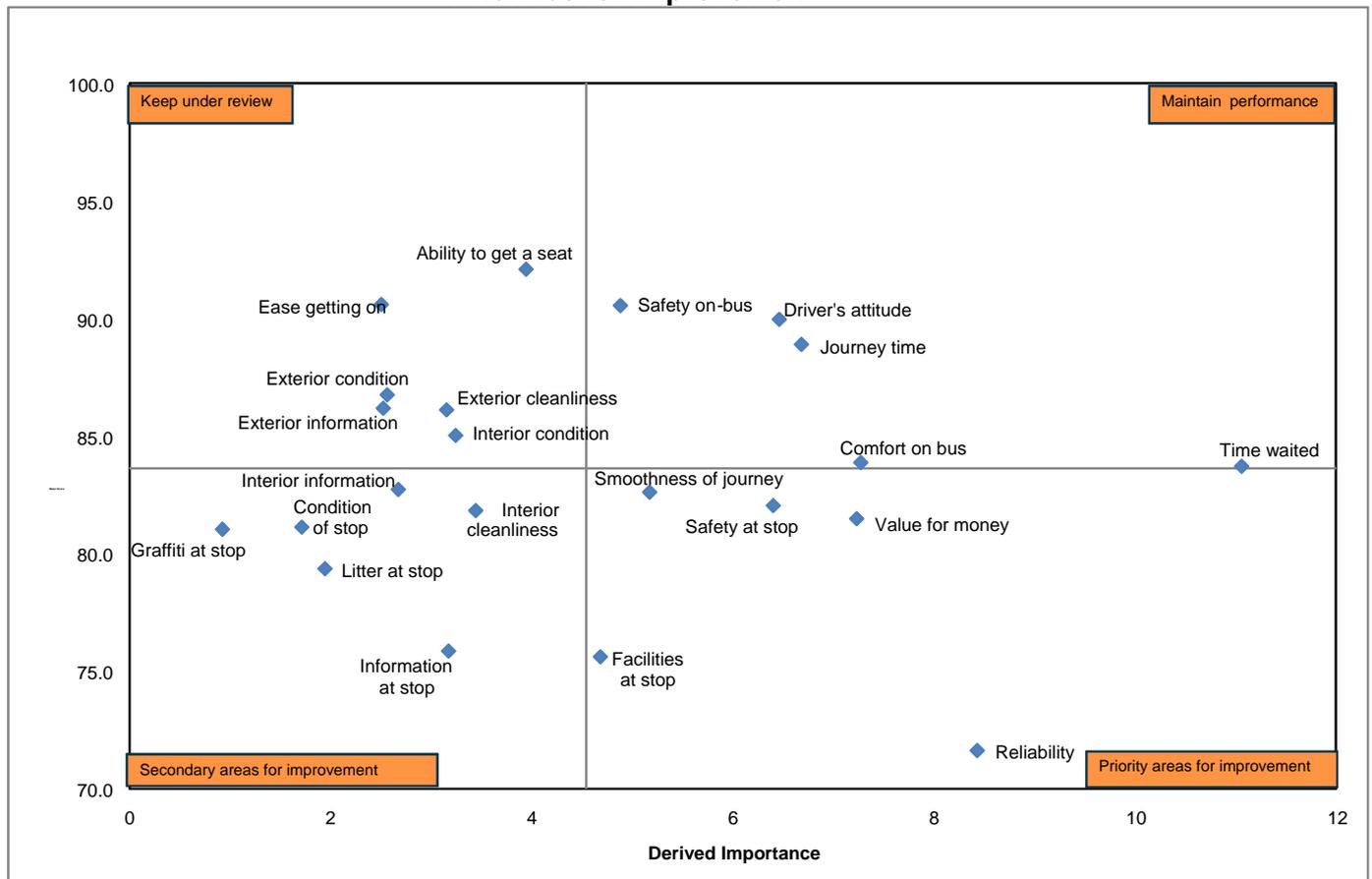
Looking at the importance and satisfaction with each of the individual service aspects, we can identify which aspects should be prioritised for improvement. The quadrant map below shows satisfaction ratings on the vertical axis and importance along the horizontal axis. Attention should be focussed on those aspects that are relatively important but where satisfaction is low (bottom right hand quadrant).

The priority area for improvement is the reliability of buses, which is the lowest rated KPI, but the second most important influence on overall service. It is also important that performance on time waited for the bus is at least maintained at its current level, as this is the biggest single influence on overall satisfaction and is on the borderline of acceptable performance.

Also important areas for improvement are value for money and safety at the bus stop. However, they have less influence on perceptions of the overall service, hence they are less of a priority than improving service reliability and time waited for the bus.

However it is encouraging that there is relatively high satisfaction on journey time as this is the fifth most important influence on overall satisfaction, and is part of the journey speed KPI.

Priorities for improvement





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