



# Bus Passenger Satisfaction Survey

Quarterly results

Quarter 4 2010-2011

## Passenger Focus research

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

### Bus Passenger Satisfaction Survey (BPSS)

BPSS has been in existence since April 2000, following the announcement by the 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 (DfT) for the Bus Passenger Satisfaction Survey (BPSS).

This is an ongoing 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 5-6 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 will be published widely and made accessible and useful to the bus industry. Please note, this is separate to the Bus Passenger Survey (also published by Passenger Focus) which was last published in July 2010.

### Methodology

This report presents the key results from quarter 4 of the Bus Passenger Satisfaction Survey carried out by Passenger Focus. It was conducted between 30 October and 26 November 2010. Passengers are approached by an interviewer at the point where 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.

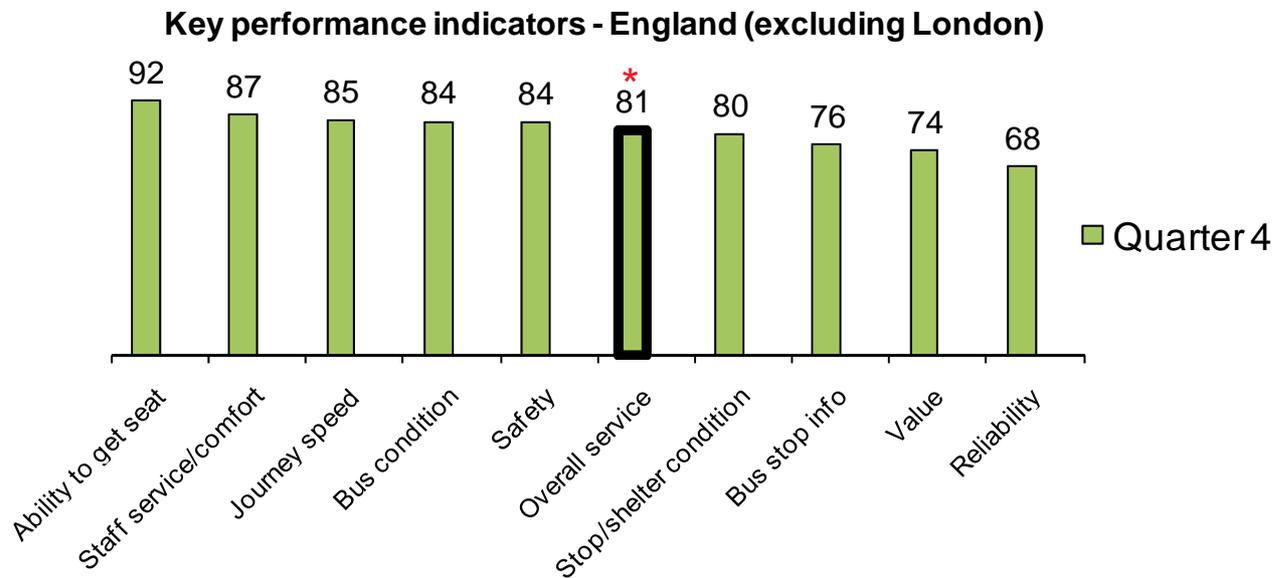
A technical annex is available as a separate document.

## Number of interviews achieved

Total interviews achieved	
	Quarter 4
England (excl. London)	3087
Metropolitan	1426
Shires	1661

## Summary

The graph below shows ratings on the key performance indicators (KPI) across England (excluding London) for quarter 4. The ability to get a seat is the highest rated KPI, and service reliability the lowest. Overall service has seen a significant fall compared to quarter 4 last year.



**\*Significant fall vs. same quarter last year**

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?”***

The average satisfaction score for overall service across England as a whole (81 out of 100) was significantly lower in quarter 4 compared with both the previous quarter and the same period last year.

The drop in satisfaction is evident across both Metropolitan and Shire areas. Passengers in the West Midlands are the least satisfied (79 out of 100) while the highest score was among passengers in the South West and the East Midlands (both at 85).

Those least satisfied tend to be younger passengers (under 24 year olds, score 76 out of 100) and those interviewed during the afternoon/evening peak (1600–1900) and after this peak period – scores in both time periods being 78 out of 100.

As expected, older bus passengers (60+) are most satisfied with the overall service (87 out of 100), as nine out of 10 use a concessionary travel pass.

<b>Overall service</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	81	-4*	-2*
Metropolitan	82	-3*	-1
Shires	81	-4*	-3*

\*significant decrease

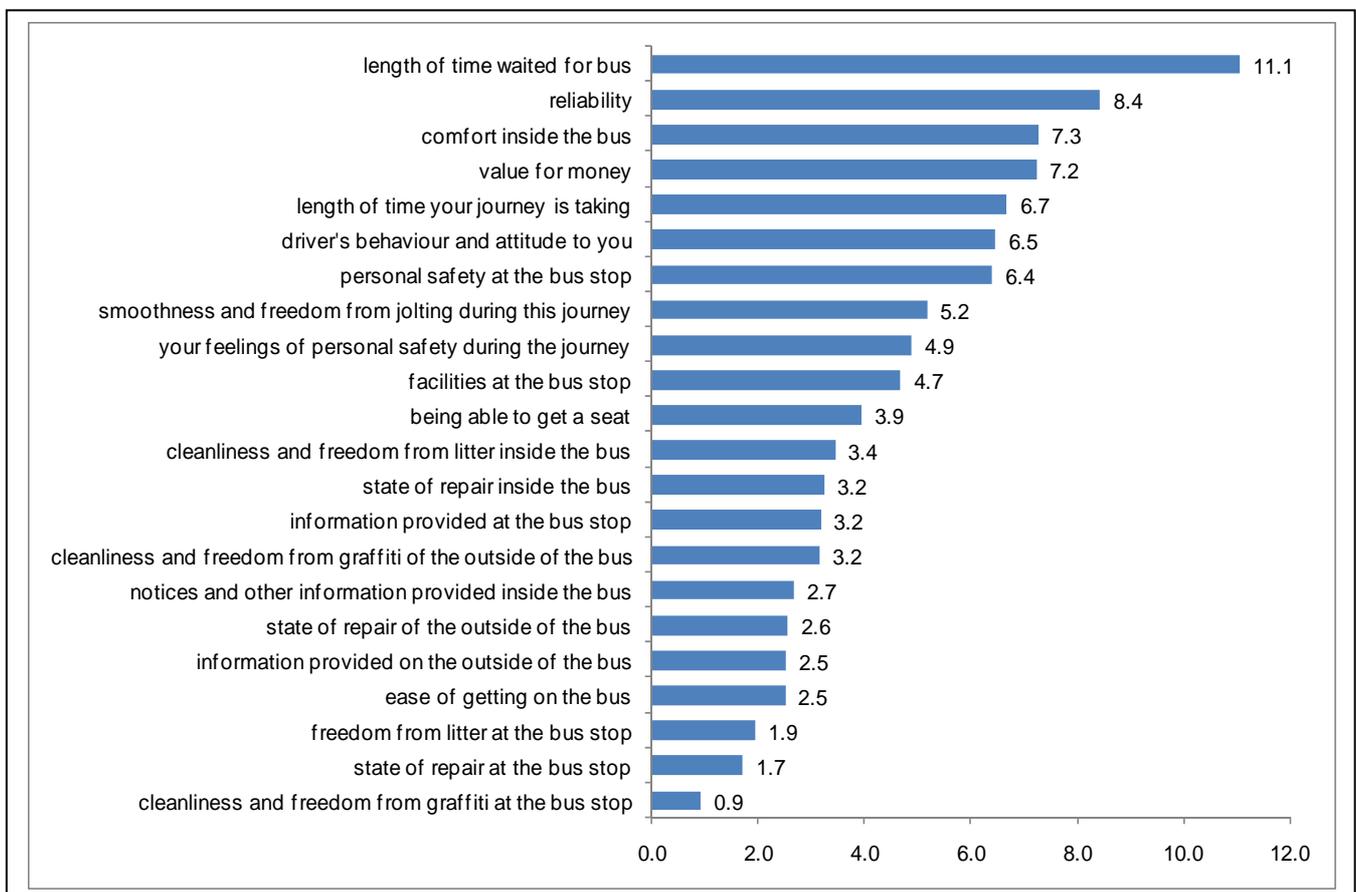
The drop in the overall service rating is due to a marked deterioration in the perceived reliability of the service and the time taken to wait for the bus. These are two of the more important influences on overall satisfaction (see below), and therefore a decline in service performance on these measures impacts overall service perceptions.

## Key influencers of overall satisfaction

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

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. A more detailed explanation of how the ridge analysis was conducted can be found in a separate document.

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



The length of time that passengers waited for a bus is the primary influencer of satisfaction, this is followed by reliability, suggesting passengers concerns primarily focus on their bus being at the time they expect.

## 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?”***

Once again, reliability has the lowest score of any of the KPIs, with an average satisfaction score of 68 out of 100 in quarter 4. Reliability is also the second highest influencer of overall satisfaction. Satisfaction with reliability has fallen significantly since last quarter.

Passengers in the Metropolitan areas were significantly less satisfied with the reliability of the service than those in Shire areas, and the year-on year drop in ratings is apparent only in the Metropolitan areas. Looking at the regions in more detail, passengers in the West Midlands are the least satisfied with this aspect of the service (62 out of 100), while reliability of buses is rated highest in the South West and the South East (73 and 72 respectively).

Satisfaction with the reliability of buses is lower among younger passengers (under 45 year olds generally, and 16-24 year olds in particular) and those travelling to and from work/education. There is an overlap of course between the two groups, with seven in ten of those working aged under 45 years.

Older passengers (60+) and those on shopping trips are the most satisfied with the reliability of buses (76 and 73 respectively), reflecting the more favourable disposition among these segments. Partly this reflects the “halo” effect of 60+ year olds not having to pay for their fare, and also a tendency generally in satisfaction surveys for older customers to rate higher.

Reliability			
	Quarter 4	Change from previous quarter	Change from last year
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	68	-5*	-1
Metropolitan	65	-5*	-2*
Shires	70**	-5*	0

\*significant decrease

\*\*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 ratings have improved this quarter, despite the fall in service satisfaction reported above. The improvement is apparent in the Shire areas where satisfaction with the service had previously fallen most, but not in the Metropolitan areas. In the Shire areas, this improvement is most evident among those who paid a cash fare for their journey (70 out of 100, up nearly four points compared with the last quarter).

However, value for money is still the second lowest KPI, and it has improved only marginally compared with the same quarter last year. Value for money is also an important driver of overall satisfaction, and is the fourth highest individual measure.

Passengers in the East Midlands are the most satisfied with value for money (81 out of 100) while the least satisfied are passengers in West Midlands (71 out of 100).

Value for money			
	Quarter 4	Change from previous quarter	Change from last year
<b>Base size (unweighted)</b>	<b>1726</b>		
England (excl. London)	74	+2*	+1
Metropolitan	73	-1	0
Shires	74	+3*	+3*

\*significant improvement

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, has remained unchanged and is the third lowest KPI.

As found before, passengers in the Metropolitan areas are significantly more satisfied with the information provided at the bus stop than passengers in Shire areas, with a three point gap.

Passengers in East Anglia and West Midlands tend to be the least satisfied with this aspect of their journey (71 and 72 respectively).

In addition, passengers travelling to and from school/college are significantly less satisfied (71 out of 100), hence lower satisfaction is recorded for younger passengers, the 16-24 year olds (74 out of 100).

<b>Bus stop information</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	76	0	0
Metropolitan	78**	0	+1
Shires	75	+1	0

\*\*significantly higher than Shires

## The condition of the stop/shelter

This is a composite measure based on an average of three scores (individual scores for quarter 4 shown in brackets):

**“How satisfied are you with:**

- **The freedom from litter** (79)
- **The cleanliness & freedom from graffiti at the bus stop** (80)
- **The state of repair at the bus stop”** (81)

Across England as a whole, satisfaction with the condition of the stop/shelter rated at 80 out of 100 has deteriorated (not significantly) compared with the previous quarter, although there is little change year on year.

The fall compared with last quarter is most apparent in Shire areas with the lowest satisfaction level achieved in the West Midlands (76 out of 100).

In addition, passengers travelling during weekday evenings (19:00-21:00) are less satisfied with the condition of bus stops (76 out of 100). This is due to lower satisfaction with freedom from litter and cleanliness of the bus stop.

<b>Stop/shelter condition</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (Excl London)	80	-2	-1
Metropolitan	80	-1	0
Shires	80	-2	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)**

Although it has dropped significantly since the previous quarter, satisfaction with the ability to get a seat, at 92 out of 100, has remained at a high level and continues to be the highest rated KPI.

There are no customer segments indicating significantly lower satisfaction, the lowest ratings being from passengers in West Midlands (89 out of 100), those travelling to and from school/college (89) and younger passengers aged 16-24 years (90).

Ability to get a seat			
	Quarter 4	Change from previous quarter	Change from last year
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	92	-1*	N/A
Metropolitan	91	-1	N/A
Shires	92	-1	N/A

\*significant decrease

Please note - ability to get a seat question was introduced in 2010/11

## Journey speed

This is a composite measure based on an average of two scores (individual scores for quarter 4 shown in brackets):

**“How satisfied are you with:**

- **The length of time you waited for the bus you just got off (82)**
- **The length of time your journey took?” (89)**

In England as a whole, satisfaction with journey speed, has remained fairly high at 85 out of 100. However, there has been a slight (insignificant) drop in score compared with the same quarter last year and the previous quarter.

There are no major differences between the Metropolitan and Shire areas, however, passengers in the West Midlands are the least satisfied with the journey speed (82 out of 100).

Younger passengers (16-24 year olds) tend to be less satisfied with the journey speed. Therefore passengers travelling to and from school/college are also less satisfied with journey speed (both at 80 out of 100).

<b>Journey speed</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	85	-2	-1
Metropolitan	85	-2	-1
Shires	84	-3	-1

## Bus condition

This is a composite measured based on the average of six scores (individual scores for quarter 4 shown in brackets):

**“How satisfied are you with:**

- **Cleanliness and freedom from graffiti of the outside of the bus** (86)
- **The state of repair of the outside of the bus,** (87)
- **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)

Following the improvement in quarter 3, satisfaction with the bus condition has dropped compared with the previous quarter and the same quarter last year (84 out of 100), although the changes are not significant.

Once again, satisfaction with the bus condition is higher in Shire areas than in Metropolitan areas. However, passengers in West Midlands and East Anglia are less satisfied with the condition of the bus (both at 81 out of 100).

While less frequent bus users (use once a month or less) are more satisfied with the bus condition (87 out of 100), passengers travelling in the afternoon peak and evenings are less satisfied (81 out of 100) mainly due to lower satisfaction with the cleanliness of the exterior and interior of the bus. This probably reflects the impact of general ‘wear and tear’ as the day progresses.

<b>Bus condition</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	84	-2	-1
Metropolitan	83	-1	-2
Shires	85	-1	-1

## Staff service/comfort

This is a composite measure based on an average of four scores (individual scores for quarter 4 shown in brackets):

**How satisfied are you with:**

- **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** (90)
- **The smoothness and freedom from jolting during the journey"** (82)

Satisfaction with staff service/comfort has not changed significantly compared with the previous quarter, and quarter 4 last year.

Satisfaction with staff service/comfort continues to be slightly higher in the Shires than in Metropolitan areas – 87 compared with 86 out of 100. Passengers in the West Midlands are the least satisfied with staff service/comfort during their bus journey (82 out of 100).

As with other aspects of the journey, those travelling to and from school/college and younger passengers are less satisfied with this aspect of their journey (83 and 84 respectively).

<b>Staff service/comfort</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	87	0	-1
Metropolitan	86	0	-2
Shires	87	0	0

## Safety

This is a composite measure based on the average of two scores (individual scores for quarter 4 shown in brackets):

**“How satisfied are you with:**

- **Your feeling of personal safety at the bus stop** (81)
- **Your feeling of personal safety during the journey”** (91)

Satisfaction with safety, remains fairly high at 84 out of 100, and has not fallen significantly. It is noteworthy though that satisfaction with on-bus safety is ten points higher than satisfaction with safety at the bus stop.

Satisfaction with safety is marginally higher in the Shires. However, both have dropped marginally compared with the same quarter last year.

Passengers in the South West are the most satisfied with their safety (89 out of 100), with passengers travelling during weekday evenings (1900-2100) being the least satisfied with their safety (79 out of 100).

<b>Safety</b>			
	<b>Quarter 4</b>	<b>Change from previous quarter</b>	<b>Change from last year</b>
<b>Base size (unweighted)</b>	<b>3087</b>		
England (excl. London)	84	-2	-1
Metropolitan	83	-3	-1
Shires	84	-2	-1

## Priorities for improvement

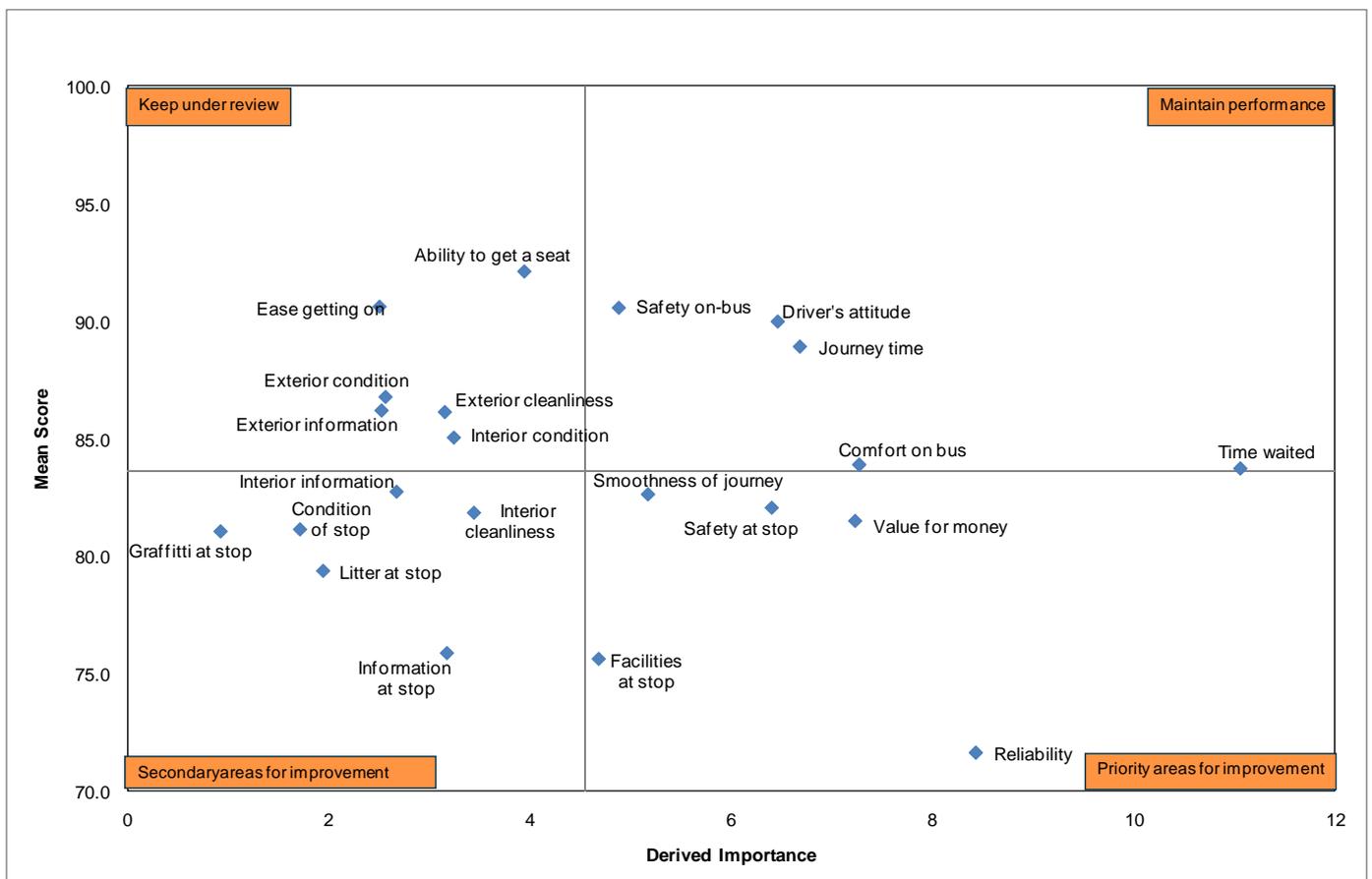
Looking at the importance and satisfaction with each of the individual service aspects, we can identify which aspects should be prioritised for improvement. The quadrant map below shows satisfaction ratings on the vertical axis and importance along the horizontal axis. Attention should be focussed on 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.

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.

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.





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