



Transport Focus

2016 Bus Passenger Survey Briefing

22 March 2017 - Liverpool



Presentation of BPS 2016 results

David Sidebottom & Robert Pain

Bus Passenger Survey 2016 - Scope

42 areas in England:

- a. 6 former metropolitan counties,
- b. 11 unitary authorities,
- c. 4 two-tier authorities,
- d. 21 bus company divisions;

Around 70% of remit journeys covered

8 areas in Scotland:

- a. 6 Transport Partnership areas (covering the majority of the mainland)
- b. 2 bus company divisions (First Glasgow and First Scotland East)

Across the entire survey, opinions to be gathered from 46,530 bus passengers.

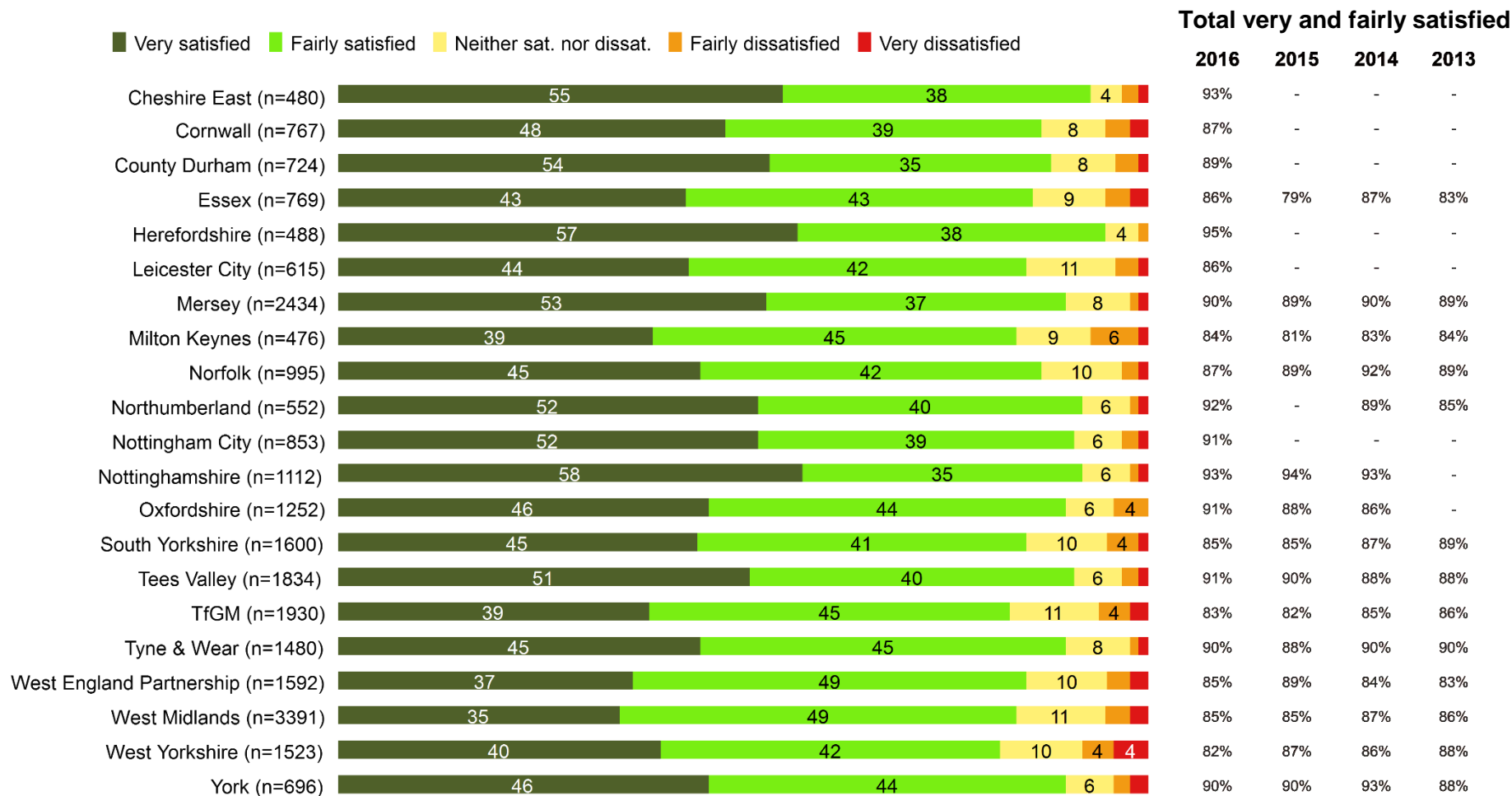
Bus Passenger Survey - autumn 2016 results

Local authority area results for key measures

Contact: Robert Pain, Insight Team, Transport Focus
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22 March 2017

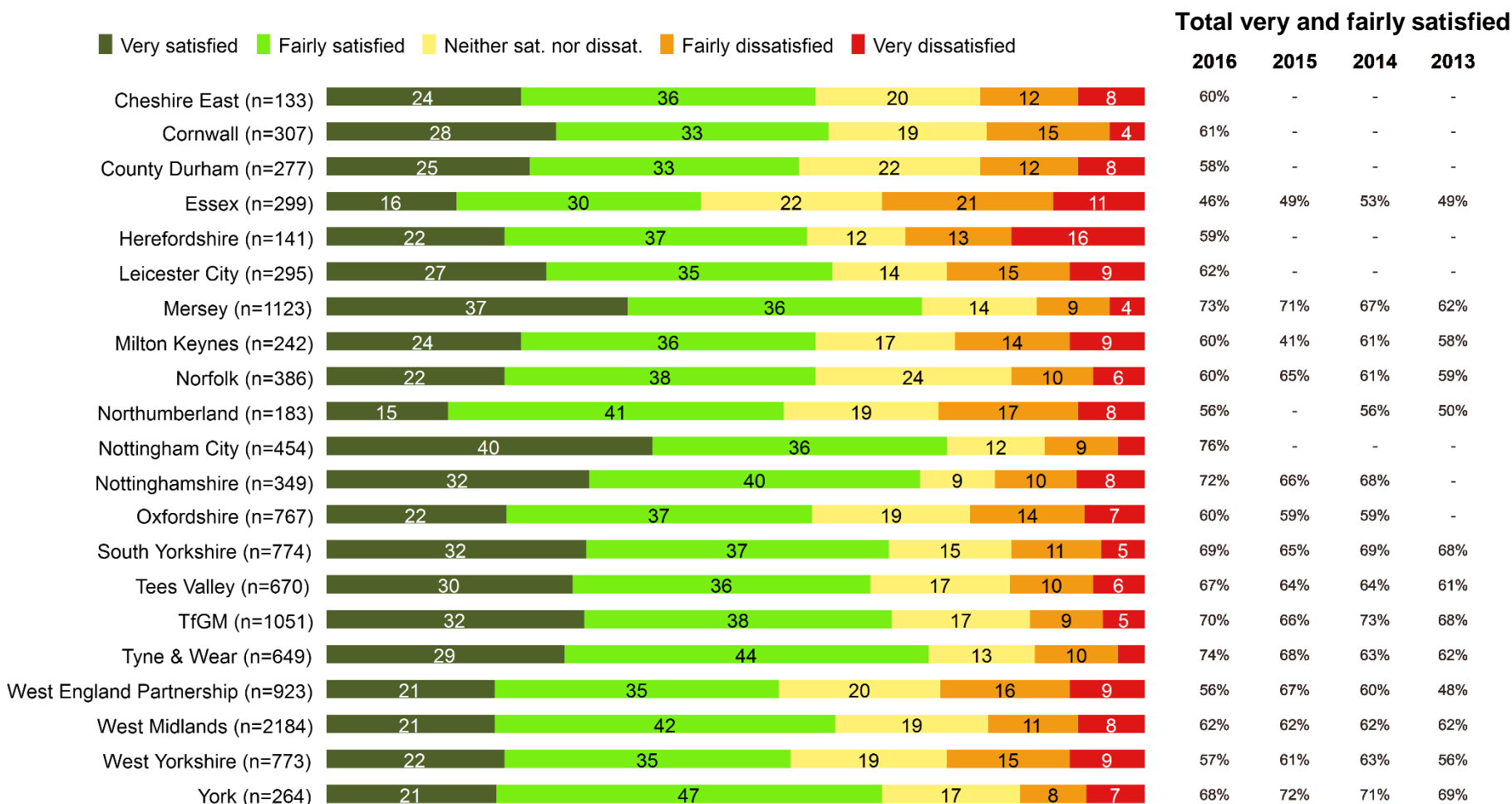
Overall satisfaction - by local authority area



Filter: HierarchicalFilter = England - Year = 2016

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

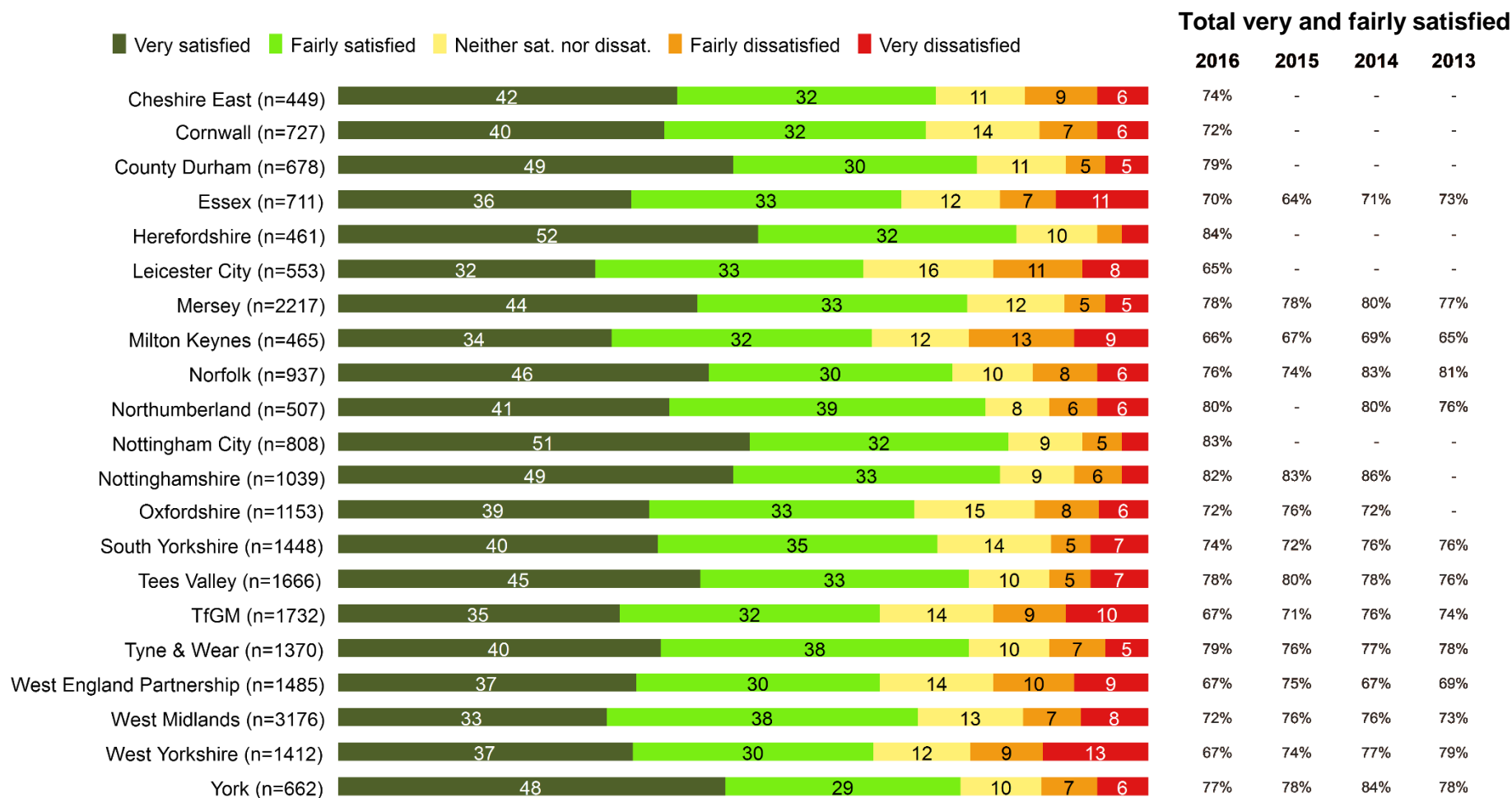
Satisfaction with VFM for fare payers - by local authority area



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

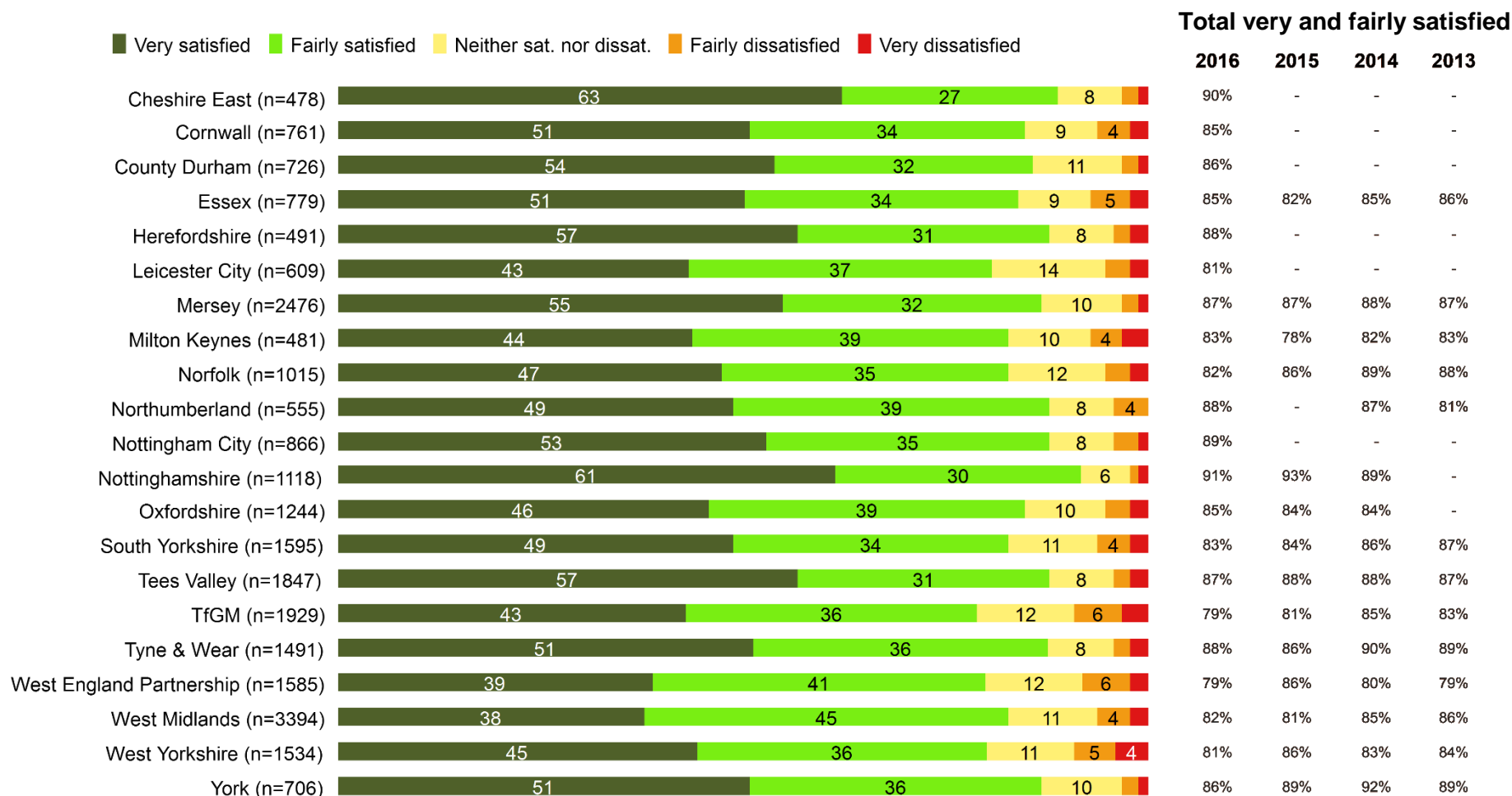
Satisfaction with punctuality - by local authority area



Filter: HierarchicalFilter = England - Year = 2016

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

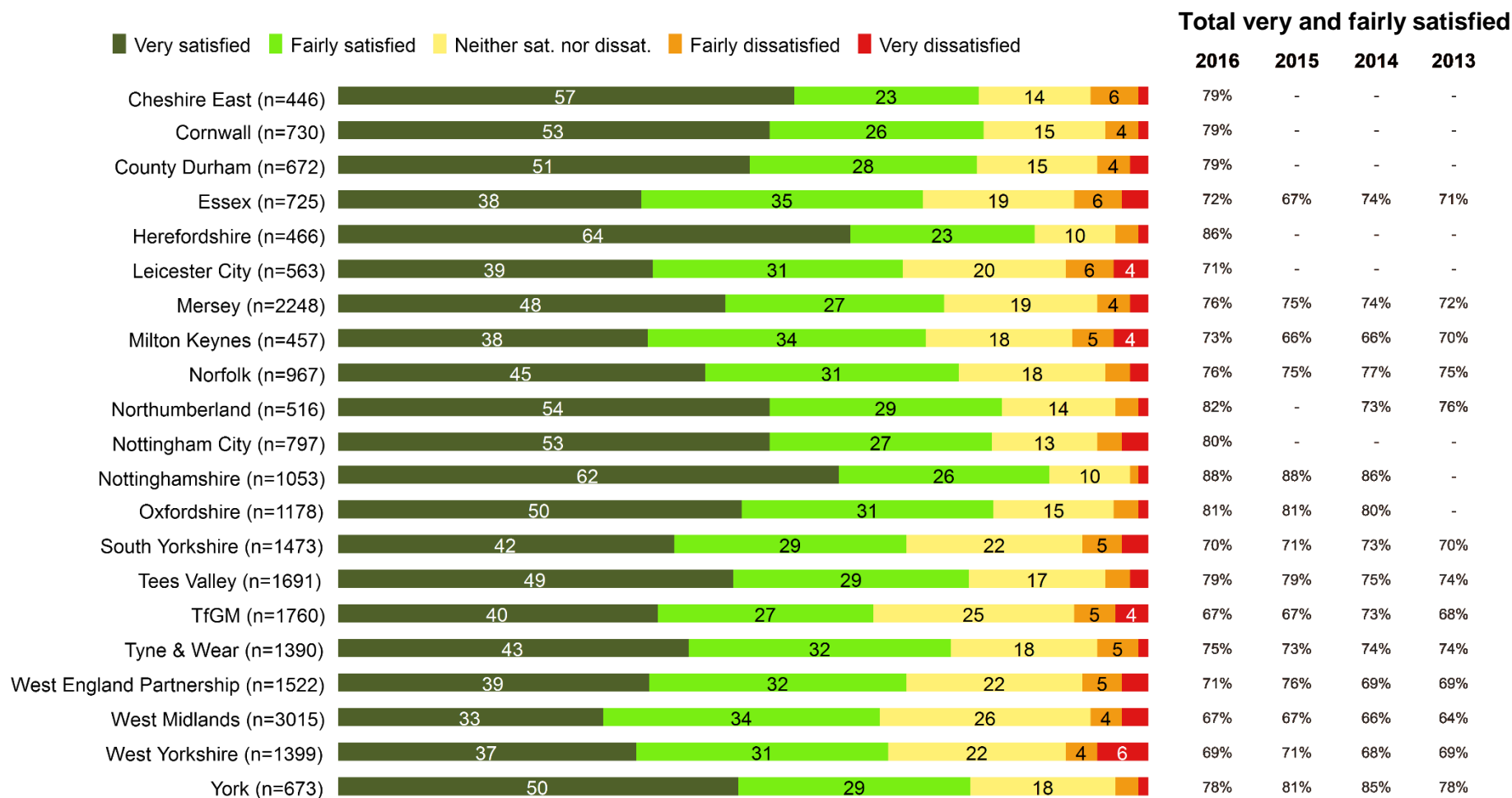
Satisfaction with on-bus journey time - by local authority area



Filter: HierarchicalFilter = England - Year = 2016

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

Bus driver sat: helpfulness/attitude - by local authority area



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Q. How satisfied were you with the helpfulness and attitude of the driver?

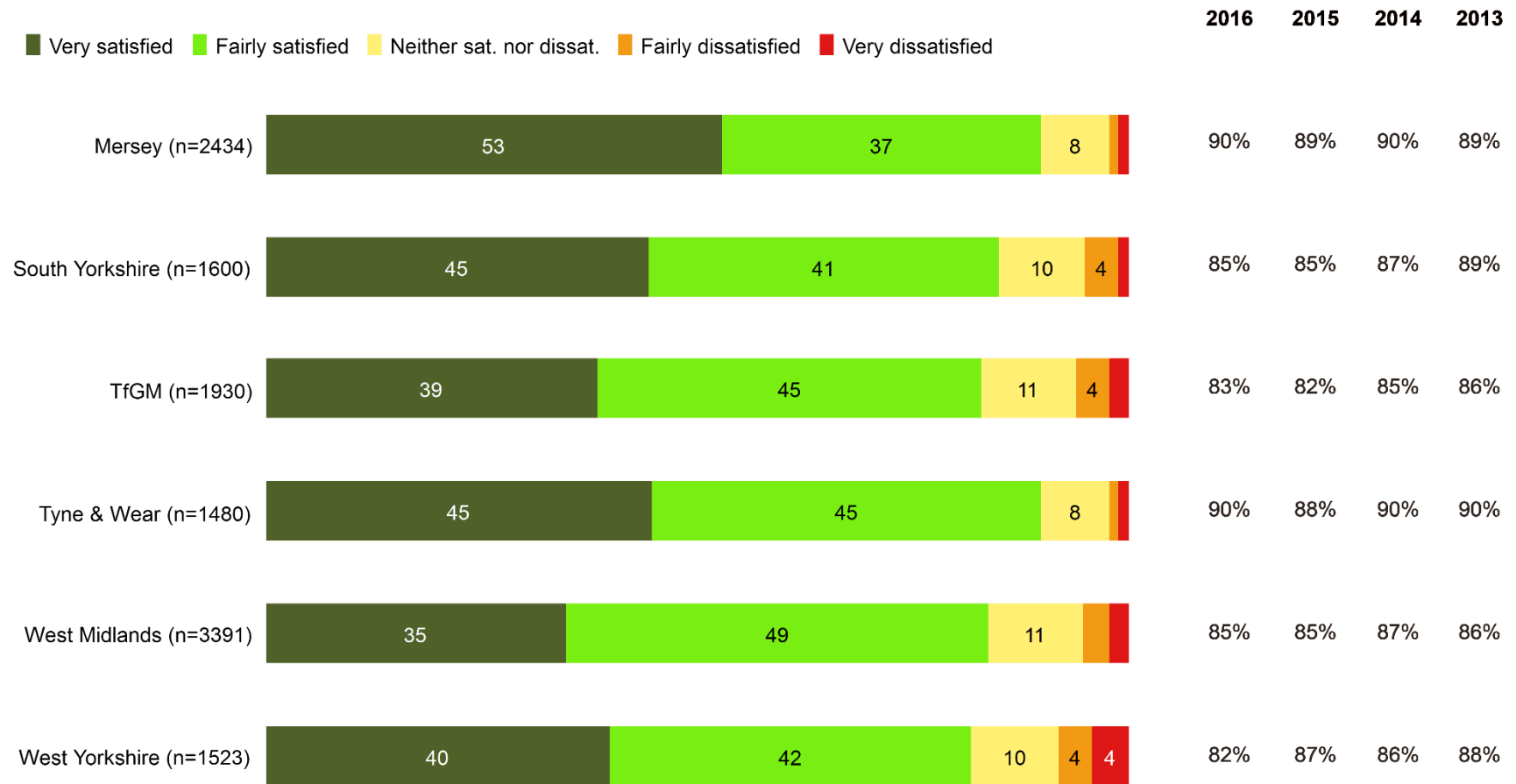
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PTE results for key measures

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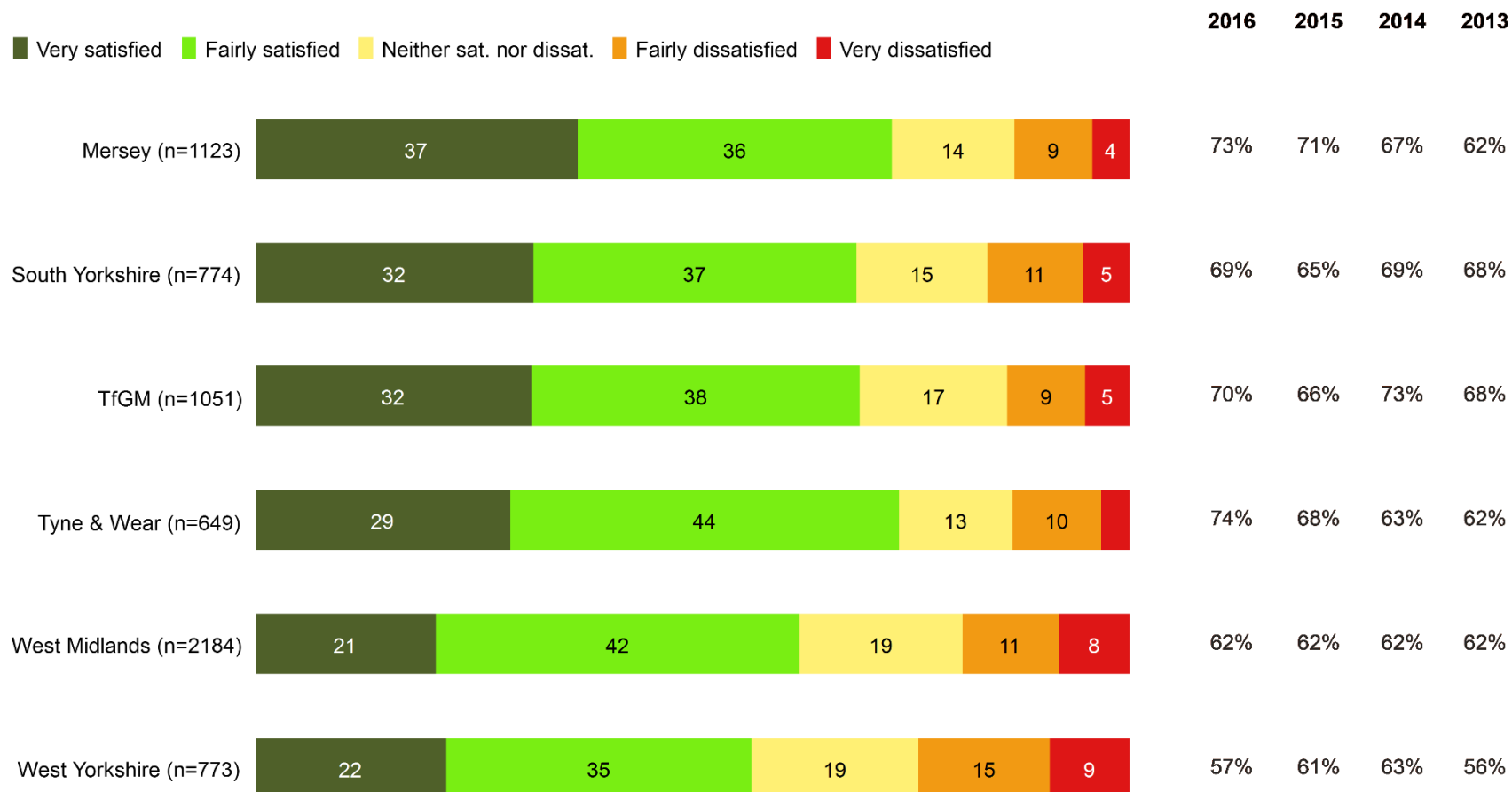
Overall satisfaction - PTEs



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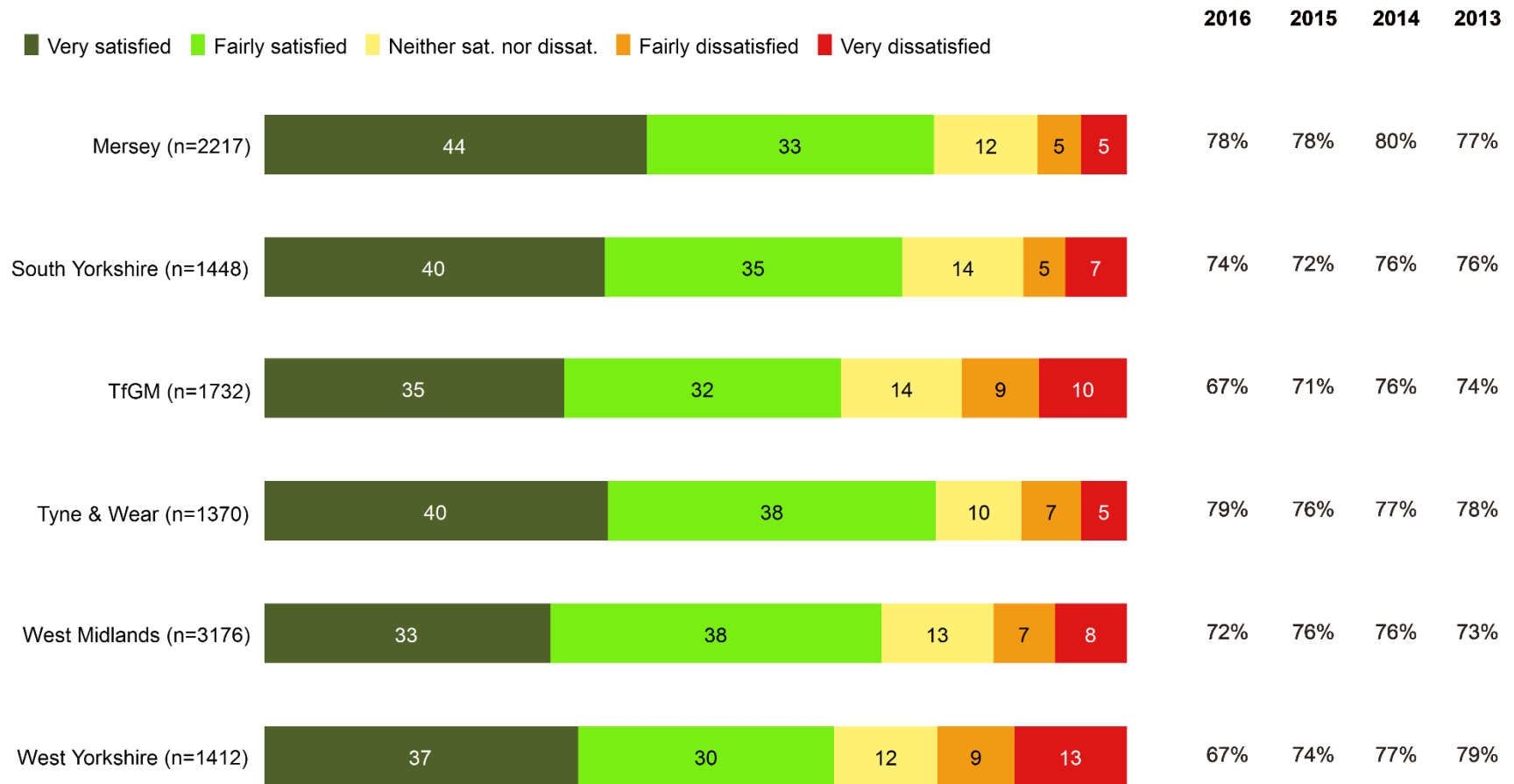
Satisfaction with VFM for fare-payers - PTEs



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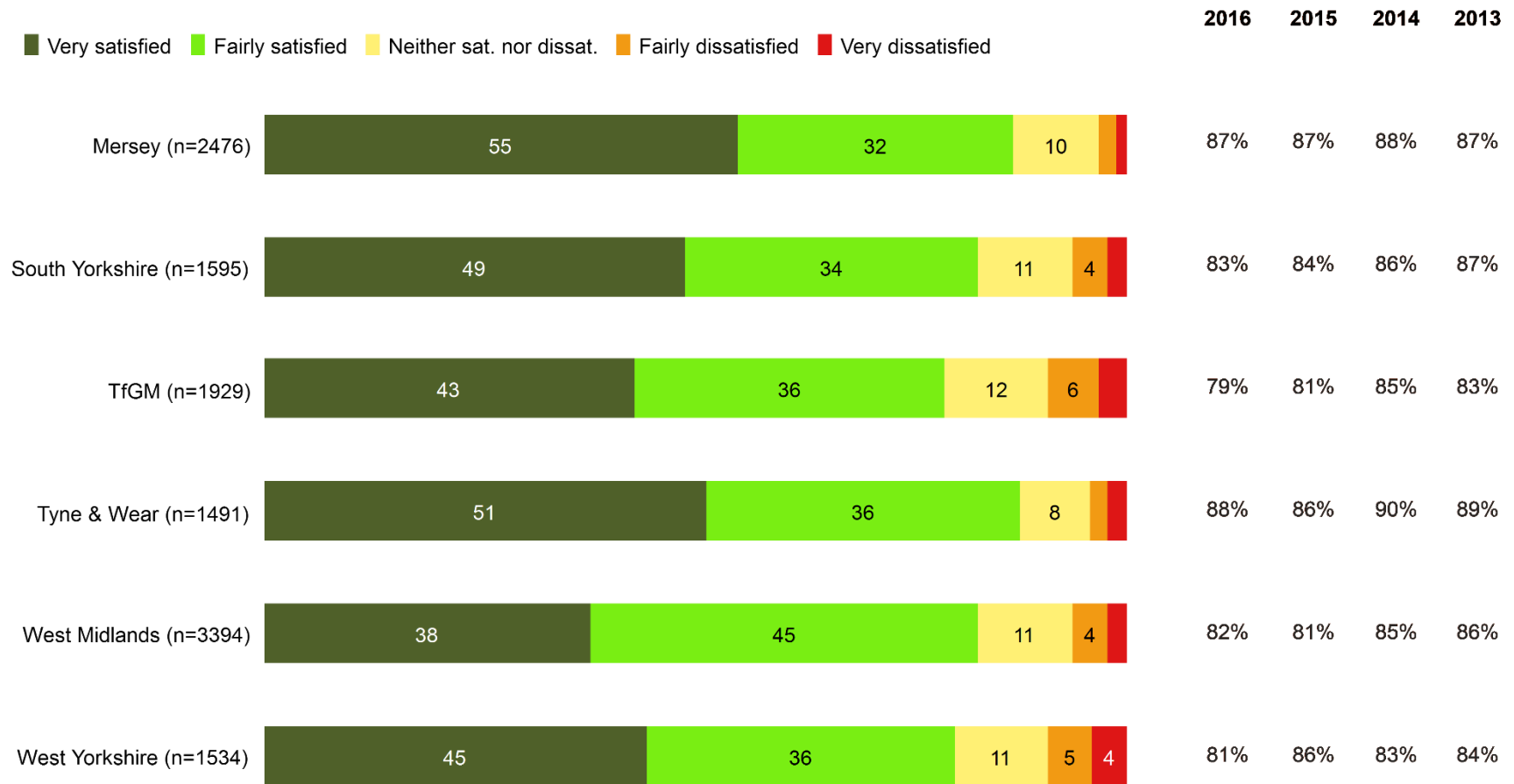
Satisfaction with punctuality - PTEs



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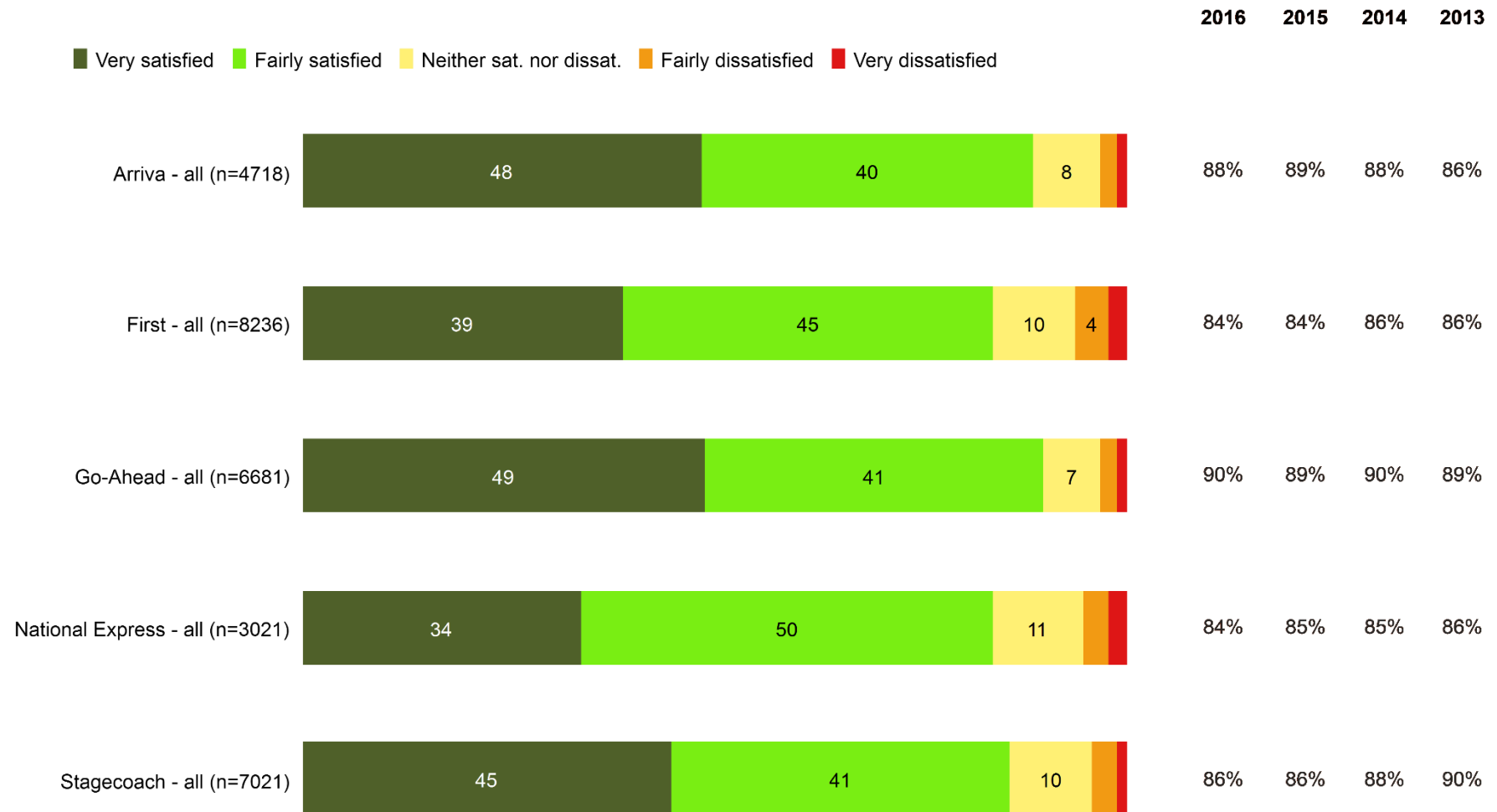
Bus Passenger Survey - autumn 2016 results

National operator results for key measures

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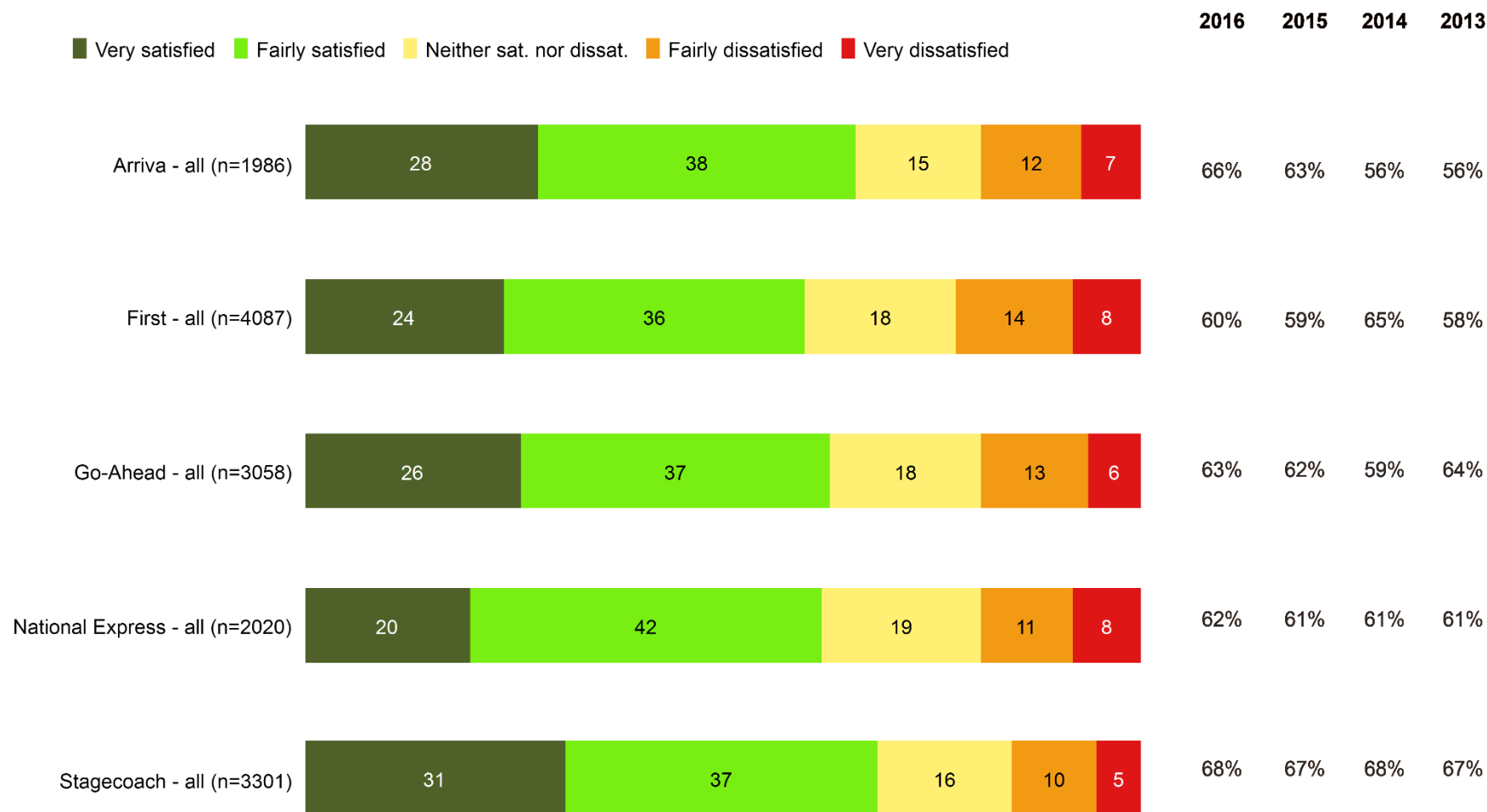
Overall satisfaction - National Operators



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

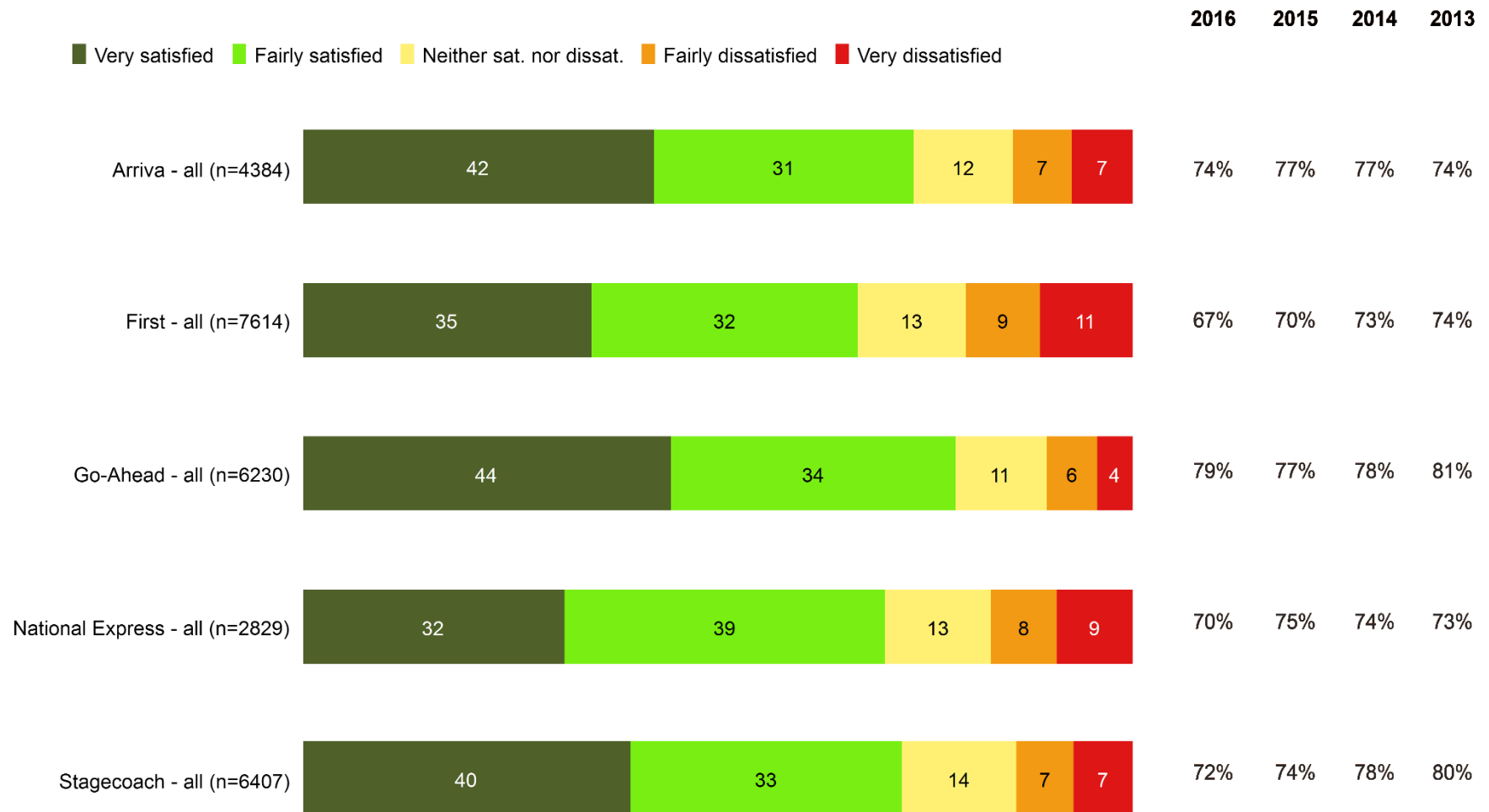
Satisfaction with VFM for fare payers - National Operators



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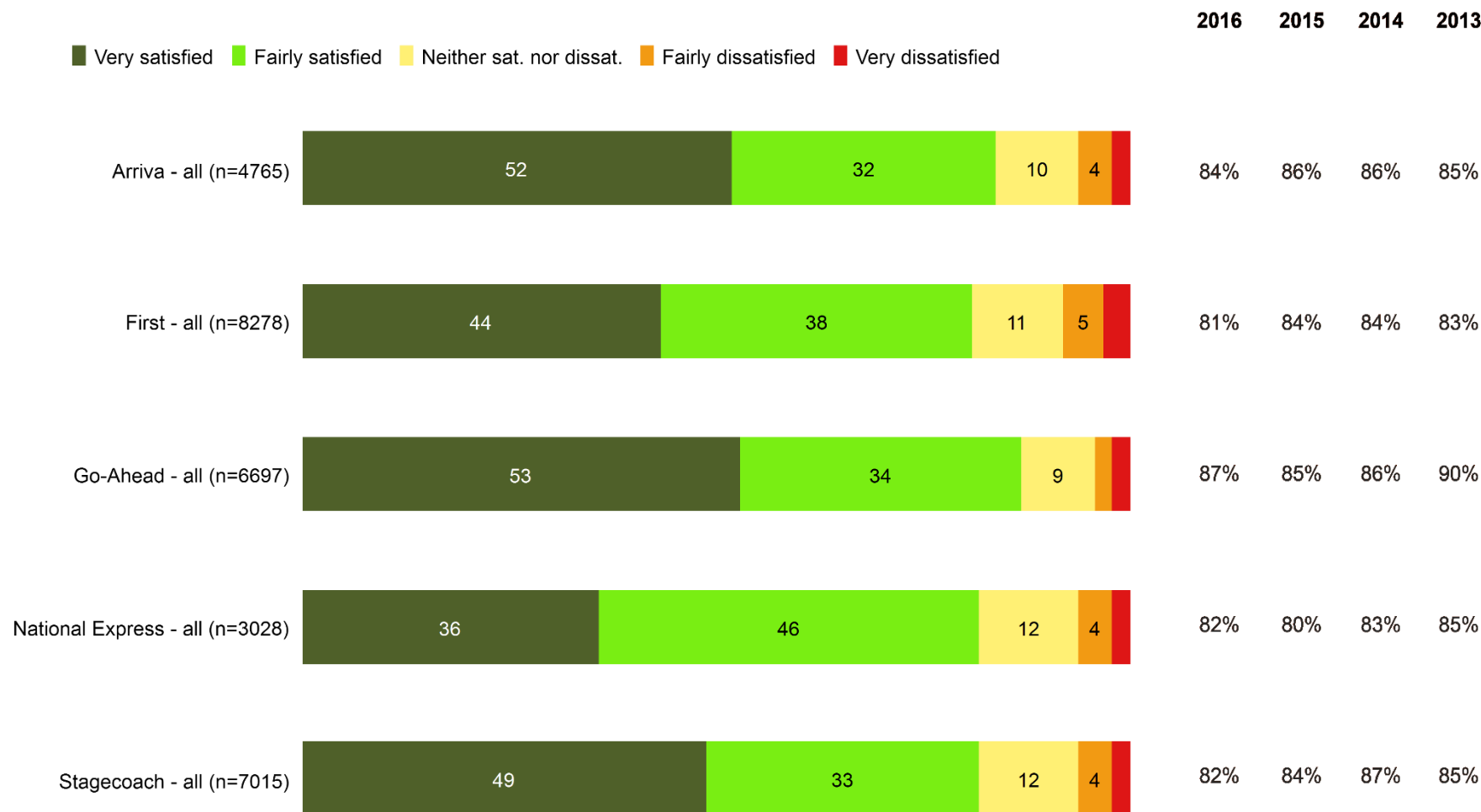
Satisfaction with punctuality - National Operators



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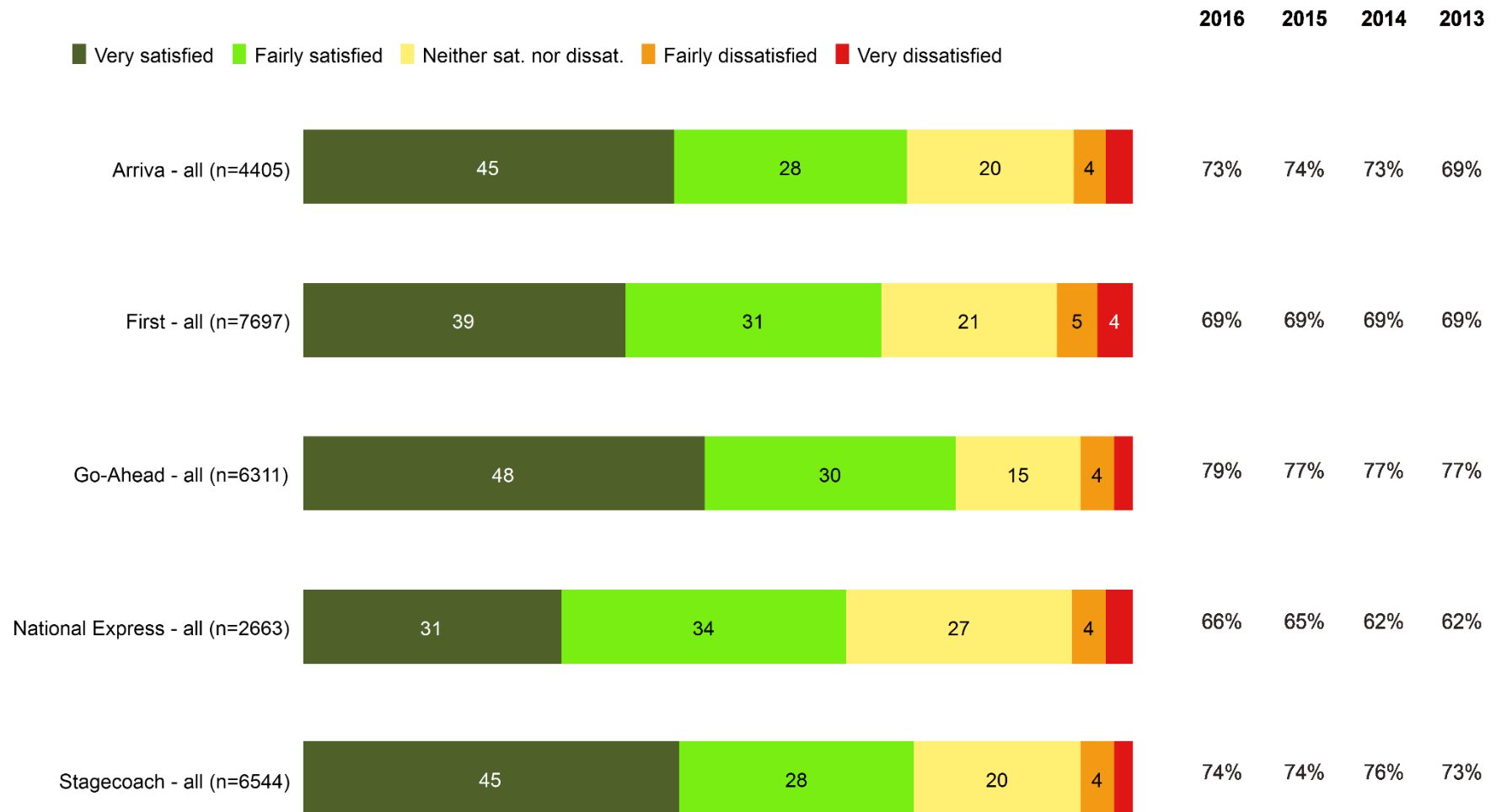
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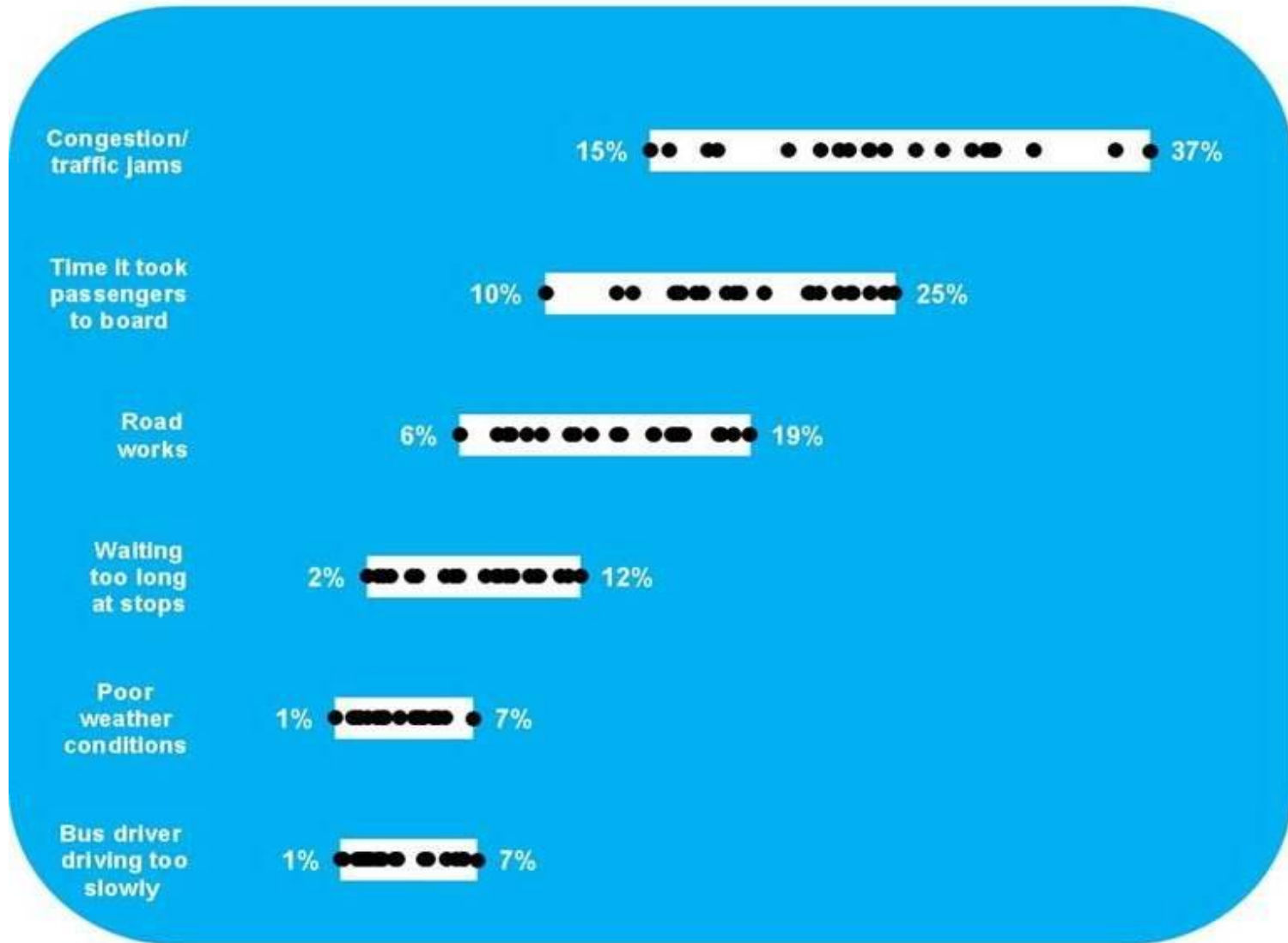
Bus Passenger Survey - autumn 2016 results

Factors affecting journey times

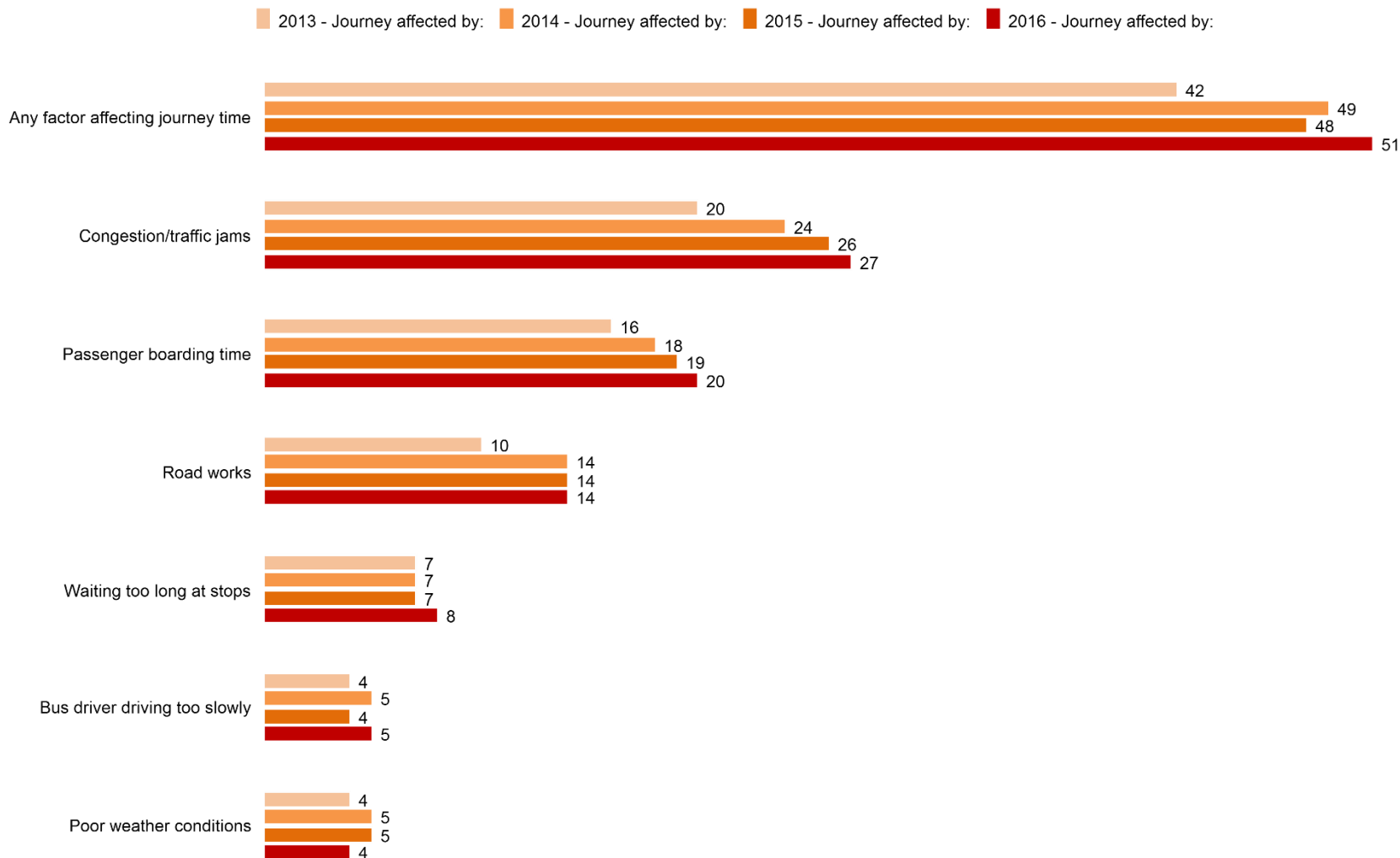
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15 March 2017

What affected journey time in England (outside London)



What affected journey time in England (outside London)



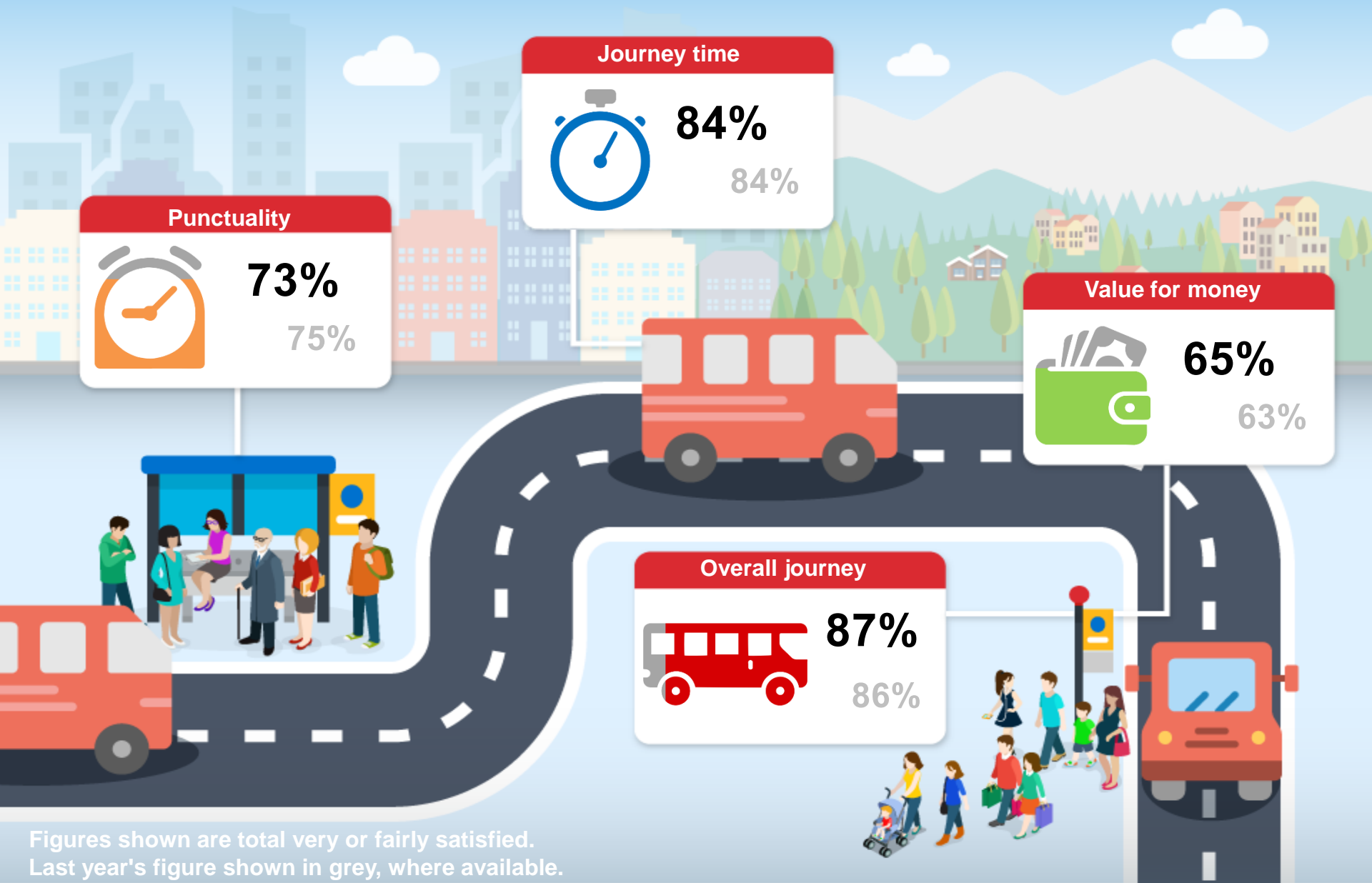
Filter: Hierarchical Filter = England

Bus Passenger Survey - autumn 2016 results

England (outside of London) – key measures

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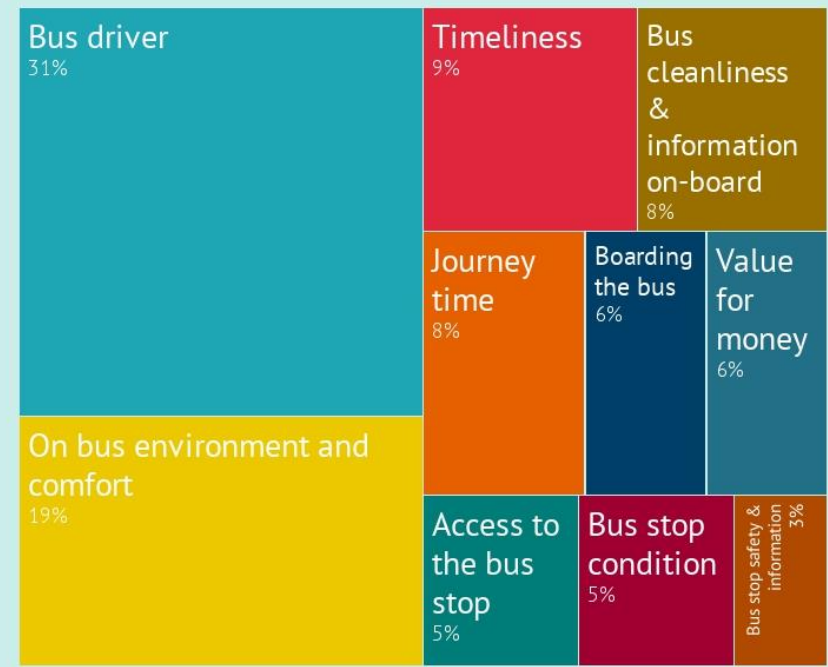
Key driver analysis: What makes a satisfactory or great journey?

What makes a satisfactory journey?



infogr.am

What makes a great journey?



infogr.am

Key Driver Analysis' looks at **fare paying passengers'** overall journey satisfaction response and their response to the 30 individual satisfaction measures in the survey (including value for money), which have been grouped into 10 themes based upon a statistical analysis of the responses.

The upper chart shows which themes most differentiate between those not satisfied and satisfied overall – making a journey 'satisfactory'.

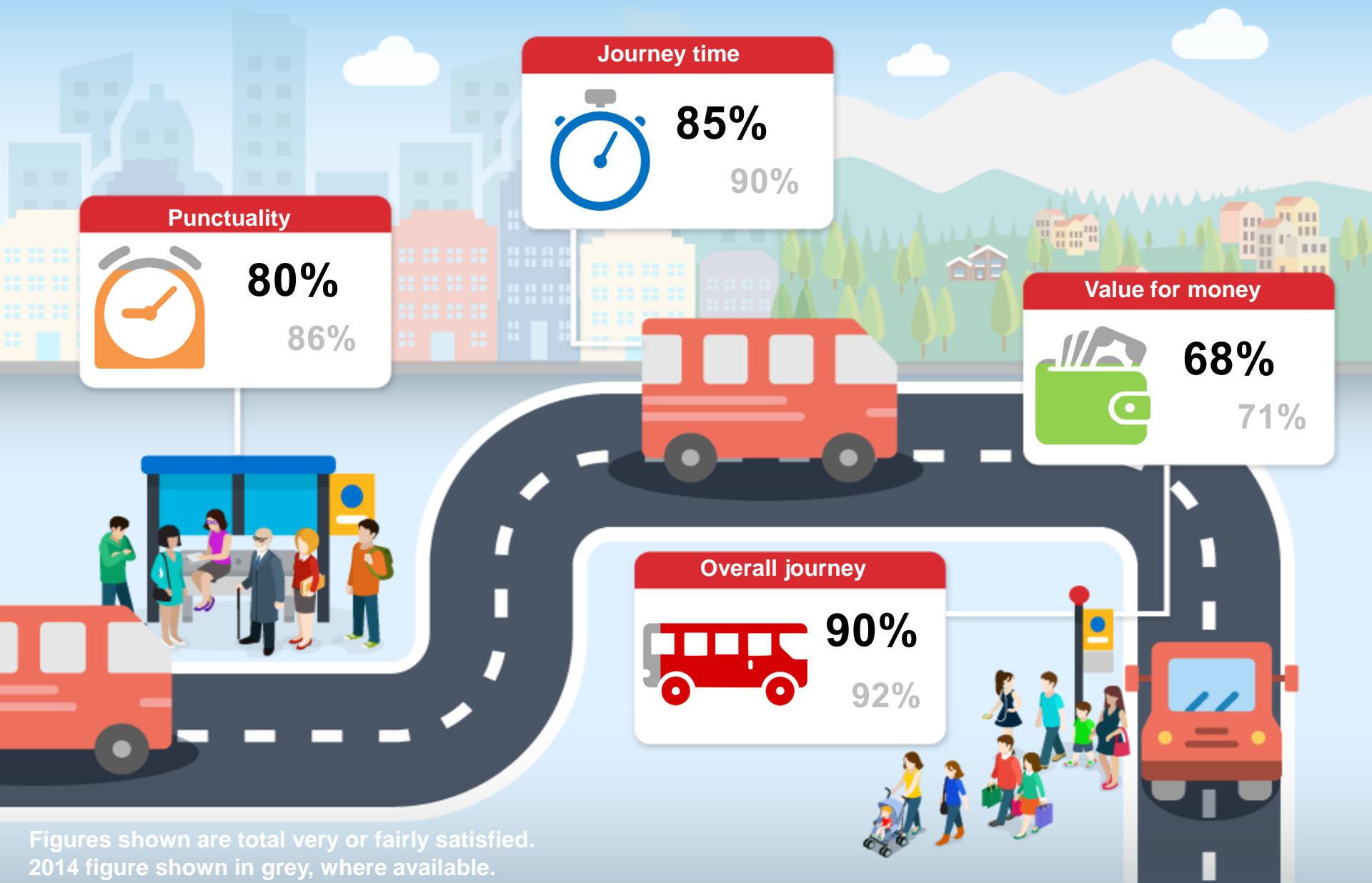
The lower chart shows which themes most differentiate between those fairly and very satisfied overall – making a 'great' journey.

Bus Passenger Survey - autumn 2016 results

Scotland – key measures

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22 March 2017



Figures shown are total very or fairly satisfied.
2014 figure shown in grey, where available.

Overall experience: What makes a satisfactory or great journey?

What makes a satisfactory journey?



info@r.am

What makes a great journey?



info@r.am

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Bus Passenger Survey 2016 results – Questions?

David Sidebottom & Robert Pain



Liverpool City Region Bus Alliance

Liam Robinson (Merseytravel), Phil Stone (Arriva) and Rob Jones (Stagecoach)

Liverpool City Region Bus Alliance

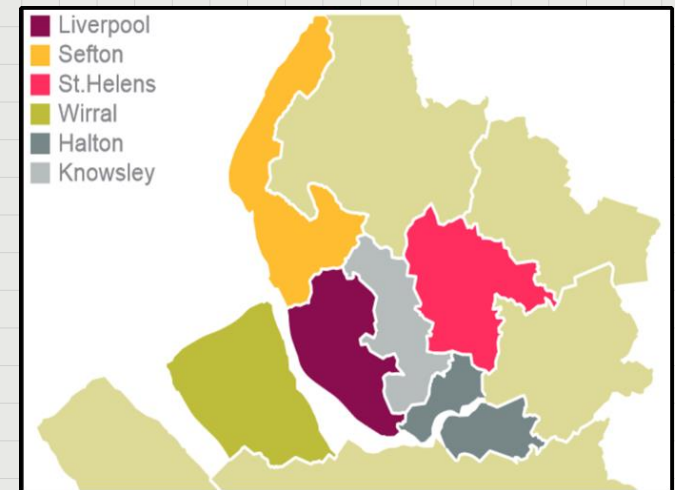
March 2017



CHANGING
THE WAY
we do Bus

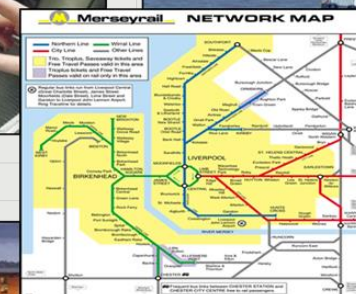
Liverpool City Region – an overview

- Population: 1.5m; functional economic population: 2.8m
- 6 Local Authority districts
- Combined Authority for Liverpool City Region
- Established in 2014
- Responsible for:
 - **transport**
 - economic development
 - skills
 - planning and housing
- Formed of:
 - leaders of 6 local authorities, including Mayor of Liverpool
 - Chair of LEP
 - various delivery bodies
- Elected Mayor for the LCR in May 2017



Liverpool City Region – Merseytravel

- The Combined Authority's strategic transport arm
- The Liverpool City Region's transport delivery body
- Builds and maintains transport infrastructure in Merseyside
- Manages the Merseyrail concession
- Operates Mersey Ferries and Mersey Tunnels
- Administers travel tickets and concessionary travel in Merseyside
- Funds non-commercial bus services



Why buses are vital to the Liverpool City Region

- 137m bus passenger journeys per year in LCR
- 80% of public transport journeys by bus despite a thriving local rail network
- Locally, buses are critical to economic growth, social capacity and access to education

Because of this, it was critical that the historic trend in patronage decline was reversed



Importance for the economy and education

- Twice the proportion of people in LCR commute by bus than UK average (x4 in Liverpool district)
- Buses take 60,000 people to their place of education every day, playing a key role in increasing post-16 education levels
- Bus users are responsible for 30% of city centre expenditure
- Bus industry one of the biggest providers of employment to LCR residents
- 30+ apprentice opportunities via the local bus industry
- Buses play a key role in tackling congestion through efficient use of road space – they keep the LCR moving
- Access to the bus network reduces employment deprivation and income deprivation
- Buses help people access the LCR's major events, playing a key role in crowd management and dispersal



Importance to society

- Buses provide access to opportunity and a way out of social isolation
- The most vulnerable in the LCR rely most on bus services
- The local bus network enables travel and social interaction for many elderly and disabled people
- Greener Journeys research shows a 10% improvement in bus services reduces social deprivation by 3.6%



Bus Strategy

- New Bus Strategy for the LCR, adopted in 2016
- Part of a multi-modal approach – new strategies for Bus, Rail, Ferry, Tunnel
- Developed in sync with the LCR Bus Alliance



Our ambition for bus services:

- ✓ A thriving, affordable and sustainable bus network that offers the customer a value for money and hassle-free journey experience - leading to fare paying patronage growth
- ✓ A mode of transport for all
- ✓ A comprehensive, integrated and easy to understand bus network that connects the LCR and makes it easier to get around
- ✓ A more punctual service, that people can rely on
- ✓ Affordable, straight forward tickets
- ✓ Accessible and simple information about bus travel
- ✓ A good on board experience – the vehicle and the driver
- ✓ Increased levels of customer satisfaction
- ✓ Value for money for the taxpayer – by minimising impact of levy reductions on customers
- ✓ Successful and high quality bus operators, continually investing in their product

Bus Alliance - overview

- A new, deeper, formal partnership between the LCRC and bus operators
- Developed over 12 months with Merseytravel, Arriva and Stagecoach, in line with aims of Bus Strategy
- Ambition for more operators to join with dialogue ongoing
- Voluntary Partnership Agreement signed in Sep 2016
- Long term partnership in place until at least 2021



Bus Alliance – aims and objectives

For Merseytravel, bus operators and the City Region to align behind common goals and work together to drive social and economic growth for the LCR

Aims:

- ✓ To grow fare paying patronage
- ✓ To quickly and significantly improve the experience for bus customers

Outcomes:

- ✓ 10% fare paying passenger growth
- ✓ Industry leading customer satisfaction levels

Bus Alliance – our approach

- Delivery through a programme of joint work, monitored by a Joint Alliance Board and Programme Board
- A Stakeholder Board provides input and challenge to the Alliance
- 6 workstreams focus on key work areas which map across to Bus Strategy (Network Design, Growth, Customer Experience Off-Bus, Customer Experience On-Bus, Punctuality and Reliability, Smarter Ticketing)
- Annual business planning process ensures continuous improvement and ongoing investment



Liverpool City Region Bus Alliance – Operators Viewpoint



Why Alliance?

- Shared interests or aims
- Formed to advance common interests
- Works as a positive for both parties
- Mutual Advantage
- Stability and no secrets

If fare paying passengers increase by 10% surely that is best for all parties?

Ticketing

Delivered:

- ✓ Myticket - £2 all day ticket for under 19s
- ✓ Adult multi operator day ticket
- ✓ Walrus as the only smartcard platform in the LCR
- ✓ Operator weekly tickets on Walrus
- ✓ Operator flat fares



Ticketing

Planned:

- ✓ Scrapping complicated zonal ticketing structure
- ✓ Introduction of new 4-weekly young persons multi operator ticket
- ✓ More operator tickets on Walrus
- ✓ Walrus web-portal for online purchases
- ✓ Carnet tickets for occasional and part time workers
- ✓ Roll-out of contactless payment in 2017



Customer Experience – on bus

Delivered:

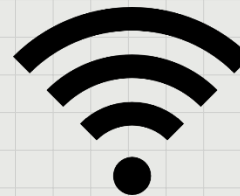
- ✓ £19m operator investment in new buses
- ✓ Further £4.9m OLEV funding through joint bid
- ✓ USB charging and Wi-Fi on all new buses
- ✓ Fleets always less than 7-year average (currently less than 6 years)
- ✓ New in service cleaning regime
- ✓ Bespoke customer service training for drivers



Customer Experience – on bus

Planned:

- ✓ Further £18m operator investment in new buses
- ✓ Enhanced “LCR Spec”
- ✓ Wi-Fi retrofit (remaining 30% of fleets)
- ✓ Interior layout review
- ✓ More driver training (1000 by end of 2017)



Customer Experience – off bus

Delivered:

- ✓ New bus station for Kirkby
- ✓ Refresh of all customer information
- ✓ Replacement of bus stops
- ✓ Upgrading of facilities at interchange points



BUSES FROM THIS STOP WEST DERBY ROAD Caird Street

THIS IS STOP 400006 IN AREA C, ZONE C1

<p>12</p> <p>STOCKBRIDGE VILLAGE This bus stops at Stockbridge Village, Caird Street, West Derby Road, and other stops in the area.</p> <table border="1"> <tr> <th>Time</th> <th>Bus</th> </tr> <tr><td>07:00</td><td>12</td></tr> <tr><td>07:15</td><td>12</td></tr> <tr><td>07:30</td><td>12</td></tr> <tr><td>07:45</td><td>12</td></tr> <tr><td>08:00</td><td>12</td></tr> <tr><td>08:15</td><td>12</td></tr> <tr><td>08:30</td><td>12</td></tr> <tr><td>08:45</td><td>12</td></tr> <tr><td>09:00</td><td>12</td></tr> <tr><td>09:15</td><td>12</td></tr> <tr><td>09:30</td><td>12</td></tr> <tr><td>09:45</td><td>12</td></tr> <tr><td>10:00</td><td>12</td></tr> <tr><td>10:15</td><td>12</td></tr> <tr><td>10:30</td><td>12</td></tr> <tr><td>10:45</td><td>12</td></tr> <tr><td>11:00</td><td>12</td></tr> <tr><td>11:15</td><td>12</td></tr> <tr><td>11:30</td><td>12</td></tr> <tr><td>11:45</td><td>12</td></tr> <tr><td>12:00</td><td>12</td></tr> <tr><td>12:15</td><td>12</td></tr> <tr><td>12:30</td><td>12</td></tr> 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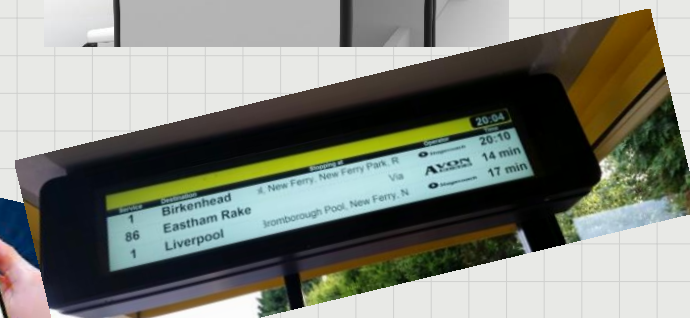
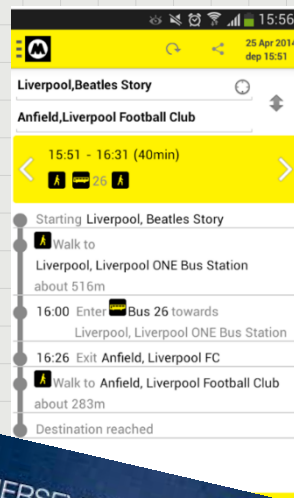
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Customer Experience – off bus

Planned:

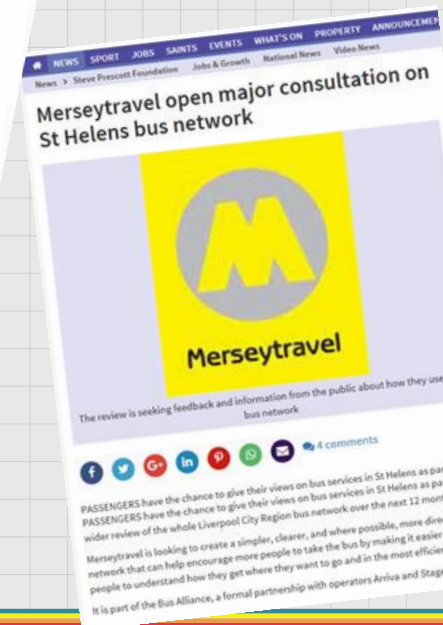
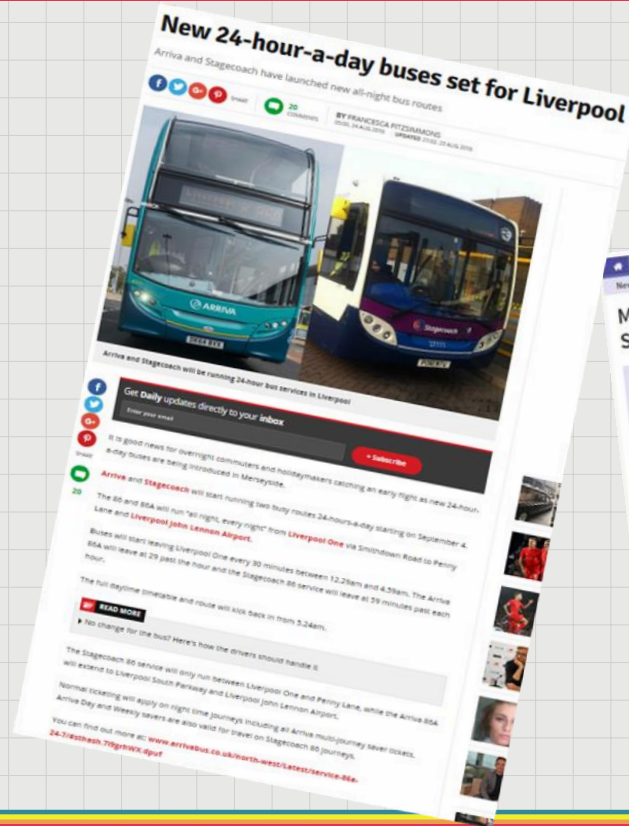
- ✓ One point of contact for customers, regardless of operator
- ✓ Joined up front line customer service teams
- ✓ Improved availability of Real Time Information



Network Design

Delivered:

- ✓ Kirkby network review
- ✓ St Helens network review
- ✓ New 24 hour bus routes launched
- ✓ Enhanced services to Liverpool John Lennon Airport
- ✓ City Centre Bus Routing Strategy – planning phase
- ✓ Coordinated timetable changes across all LCR operators – 4 x per year



Network Design

Planned:

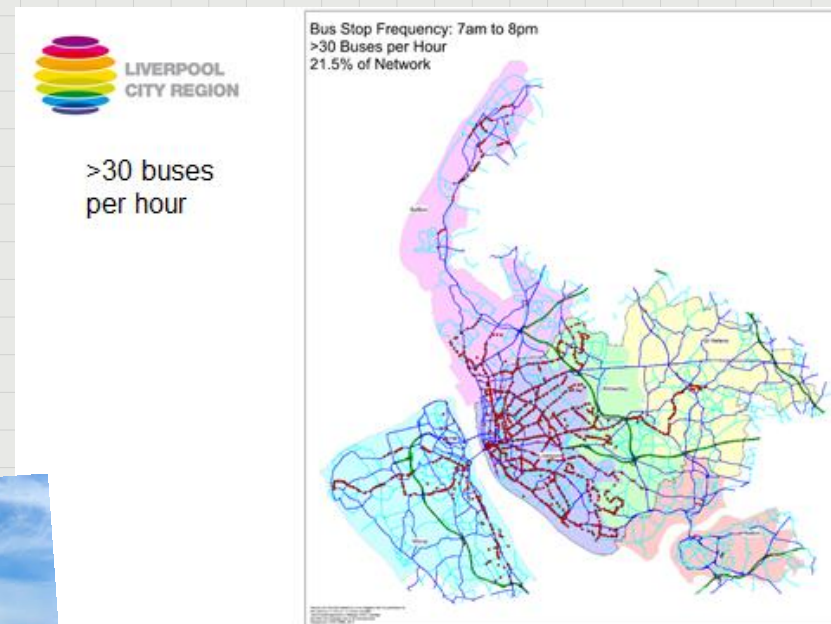
- ✓ Sefton network review
- ✓ Liverpool network review
- ✓ Wirral network review
- ✓ Knowsley network review
- ✓ City Centre Bus Routing Strategy – delivery phase



Punctuality and reliability

Delivered:

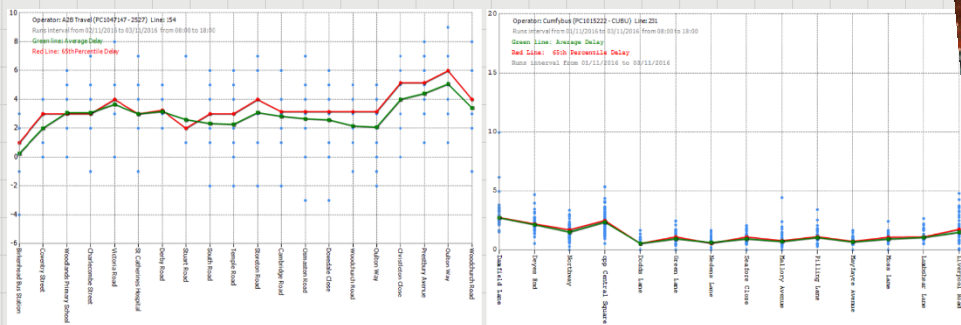
- ✓ Intelligent Traffic Signal Bus Priority trial – route 10
- ✓ Congestion hotspot identification process
- ✓ Local Growth Fund (LGF3) bid submitted
- ✓ Key Route Network recognised in Alliance governance
- ✓ Additional vehicles to maintain punctuality



Punctuality and reliability

Planned:

- ✓ Delivery of 7 x punctuality and reliability schemes
- ✓ Development of scheme pipeline
- ✓ Further roll out of Intelligent Traffic Signal Bus Priority



Growth

Delivered:

- ✓ Joint marketing initiatives
- ✓ Design of joint marketing and engagement campaign – *Better By Bus*
- ✓ Appointment of partner agency



Growth

Planned:

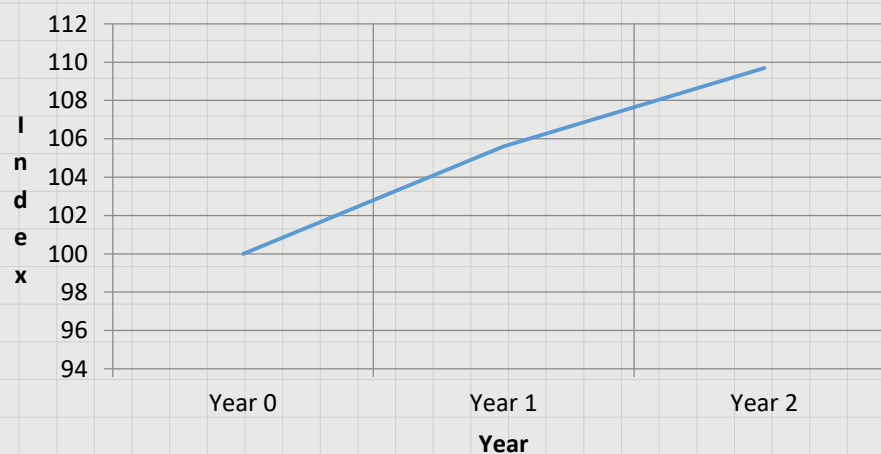
- ✓ Pooled marketing budget (£0.5m)
- ✓ Delivery of joint marketing and engagement campaign – *Better By Bus*
- ✓ Use of *Better by Bus* in operator's own activity



Bus Alliance – results

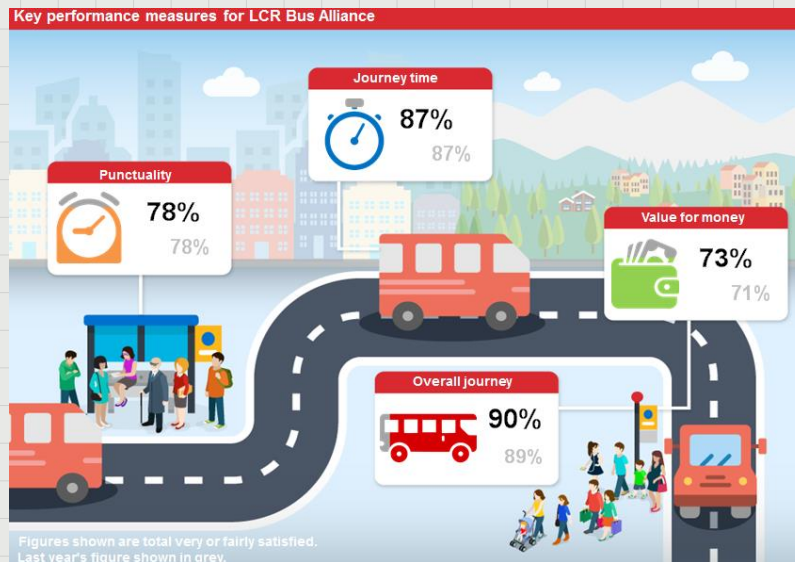
- ✓ Fare paying patronage is growing
- ✓ Customer Satisfaction is increasing

LCR Bus Alliance - indexed fare paying passengers



Bus Alliance – results

- ✓ Fare paying patronage is growing
- ✓ **Customer Satisfaction is increasing**



Example:

Value for money has increased by 10% since 2013. Since then, Myticket has been launched, 50% off for young people, change of Young Person classification to under-19 from under-16, introduction of flat fare regime

These actions have directly impacted on customer satisfaction, and led to fare paying passenger growth, with more action to come



LIVERPOOL CITY REGION
BUS ALLIANCE



Liverpool City Region Bus Alliance - Questions?

Matt Goggins (Merseytravel), Phil Stone (Arriva) and
Rob Jones (Stagecoach)



Transport Focus

2016 Bus Passenger Survey

22 March 2017 - Liverpool