



Arolwg Teithwyr Bysiau – Yr hydref 2017

Bus Passenger Survey – autumn 2017

Wales Bus Summit 3 May 2018



Gweithio mewn partneriaeth gyda
Llywodraeth Cymru
Working in partnership with
Welsh Government



Bus Users Cymru
Gweithio dros deithwyr
Working for passengers

transportfocus
ffocws ar drafnidiaeth 

Bus Passenger Survey 2017 – Scope

Eighth annual survey – first GB-wide survey – opinions from nearly 48,000 passengers of the journey they were making

Nearly 5,000 responses across Wales, thanks to funding from Welsh Government and main operators and the support of Bus Users Cymru

10 areas in Wales:

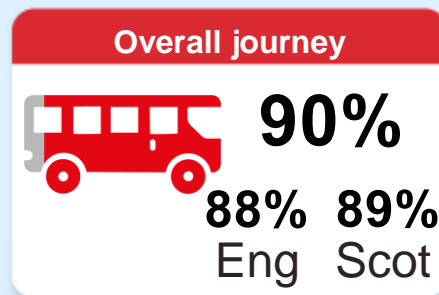
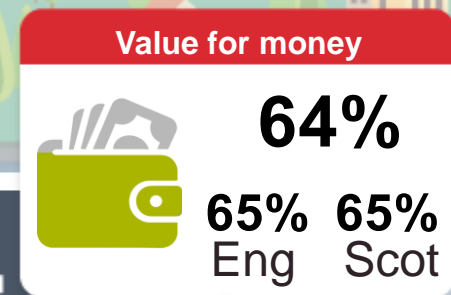
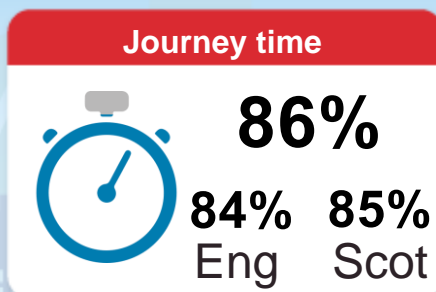
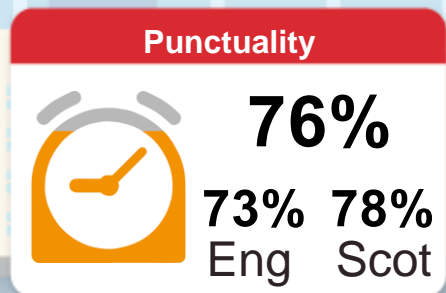
- a. 4 Welsh regions (North, Mid, South East, South West)
- b. 5 bus company divisions (Arriva, Cardiff Bus, First, Newport Bus, Stagecoach)
- c. TrawsCymru services

48 areas in England:

- a. 6 metropolitan areas (former PTEs)
- b. 21 county/unitary authorities
- c. 21 bus company divisions;

8 areas in Scotland:

- a. 7 bus company divisions (for First, Stagecoach and National Express)
- b. 1 authority area (Aberdeenshire)



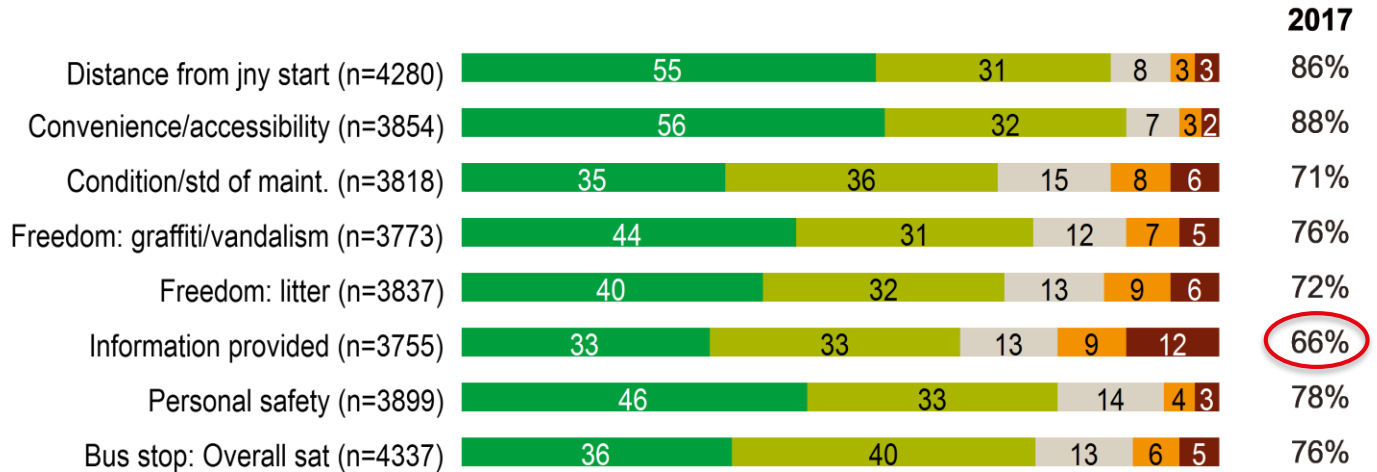
At the stop: satisfaction with the bus stop

Needs better maintenance and quality of information – including fares

Wales

Total very and fairly satisfied

Very satisfied Fairly satisfied Neither sat. nor dissat. Fairly dissatisfied Very dissatisfied



◀ before leaving

Information

at the bus stop ▶

40%
timetable
Leaflet

22%
Traveline
Cymru
online

18%
live
position
updates

50%
timetable
Poster

34%
digital
Display

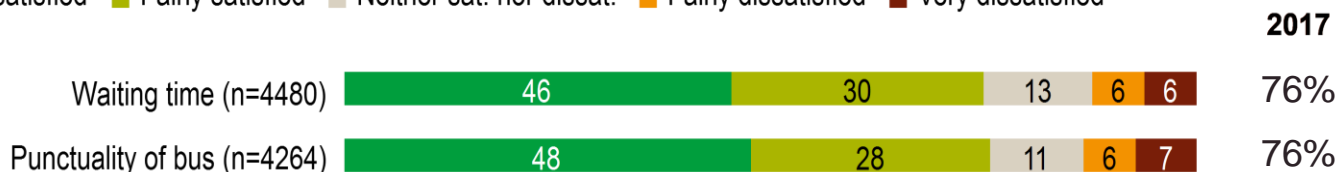
Waiting: waiting time and punctuality

Under pressure in North and South East Wales

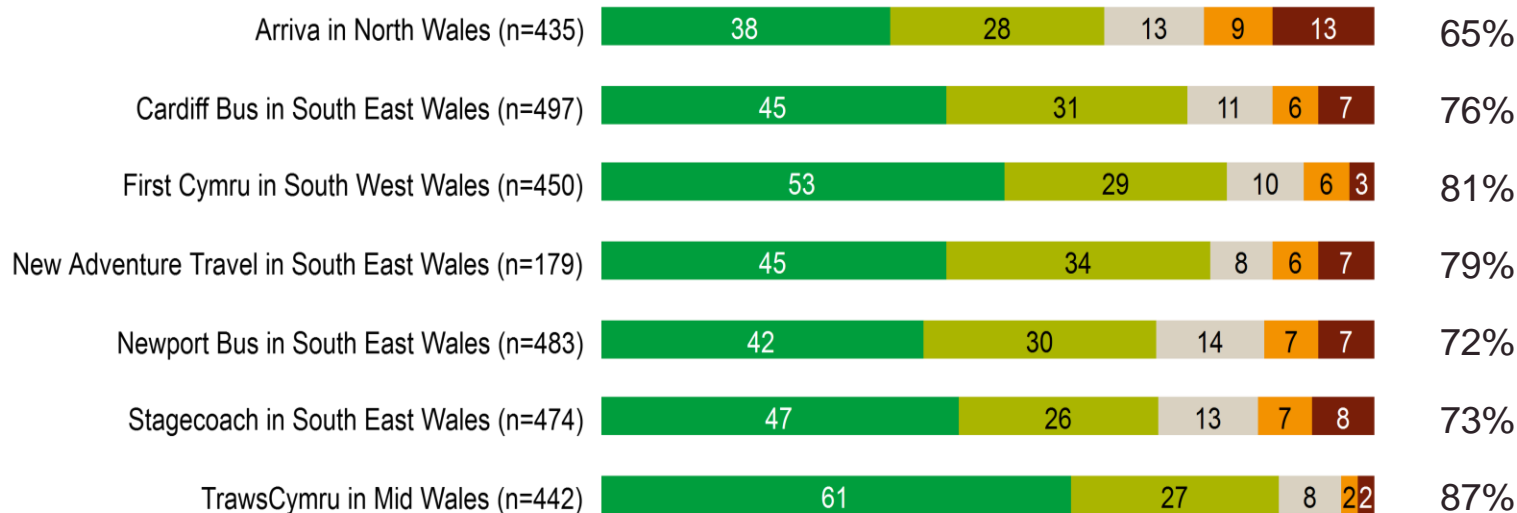
Total very and fairly satisfied

Wales overall

■ Very satisfied
 ■ Fairly satisfied
 ■ Neither sat. nor dissat.
 ■ Fairly dissatisfied
 ■ Very dissatisfied



Wales operators



On the bus: journey time

22% of journeys impacted by congestion, 14% by boarding time

Satisfaction with on-bus journey time

Total very and fairly satisfied

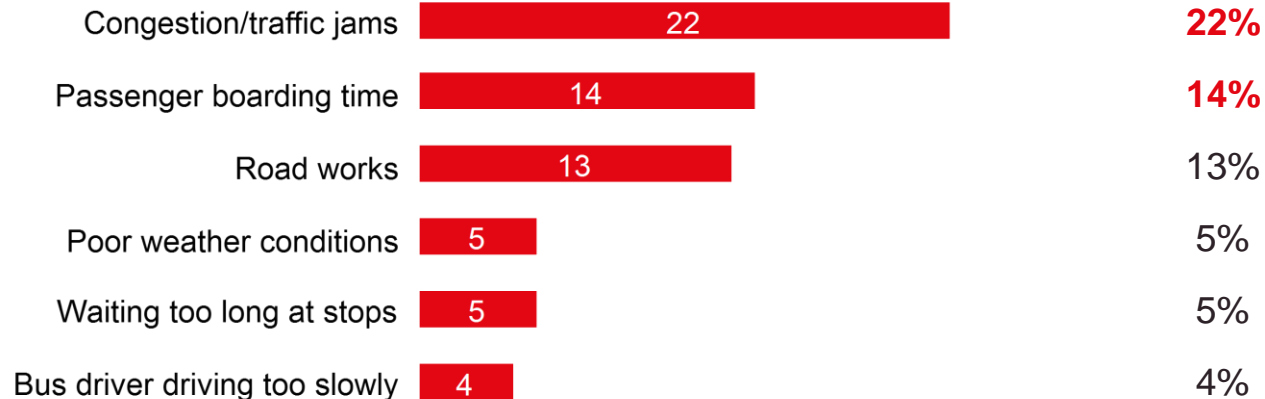
■ Very satisfied
 ■ Fairly satisfied
 ■ Neither sat. nor dissat.
 ■ Fairly dissatisfied
 ■ Very dissatisfied

2017



What affected journey time?

■ Journey affected by: (n=4865)



Pressure of the afternoon peak

Results show a pattern across Britain that the afternoon peak on weekdays is growing, putting pressure on services and satisfaction. Collaboration is crucial to identify measures to alleviate

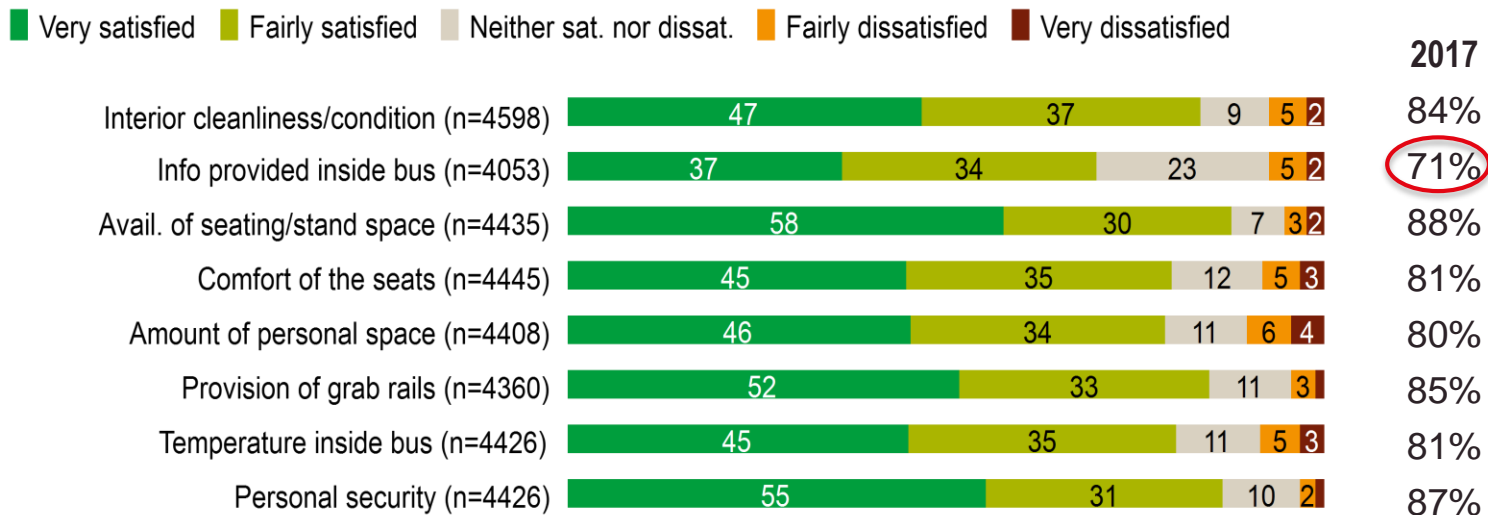
WALES	AM peak	PM peak	Off peak	Weekend
Waiting time	71%	63%	79%	77%
Punctuality	70%	64%	80%	78%
Journey time	86%	78%	87%	88%
Boarding time	90%	87%	92%	93%
Seat availability	89%	82%	89%	88%
Personal space	74%	69%	82%	83%
Driving: smoothness	80%	79%	83%	83%
Driving: safety	90%	88%	90%	92%

On the bus: features, condition and space

Information needs improving – audio/visual lifts satisfaction

Wales

Total very and fairly satisfied



◀ audio available

Satisfaction with information

visual available ▶

YES ✓
83%

NO ✗
64%

YES ✓
81%

NO ✗
63%

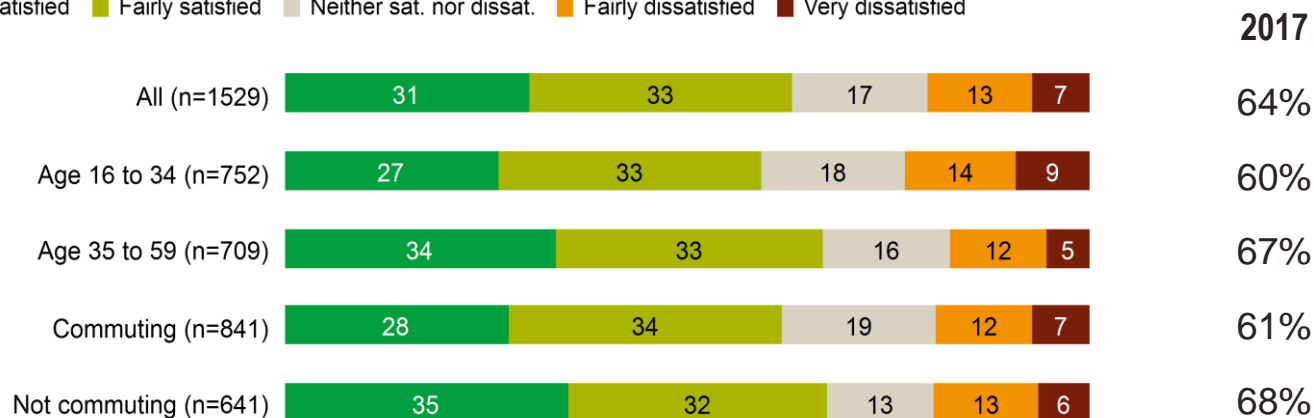
Overall experience: satisfaction with value for money (VFM)

Highly dependent on local performance, ticketing and initiatives

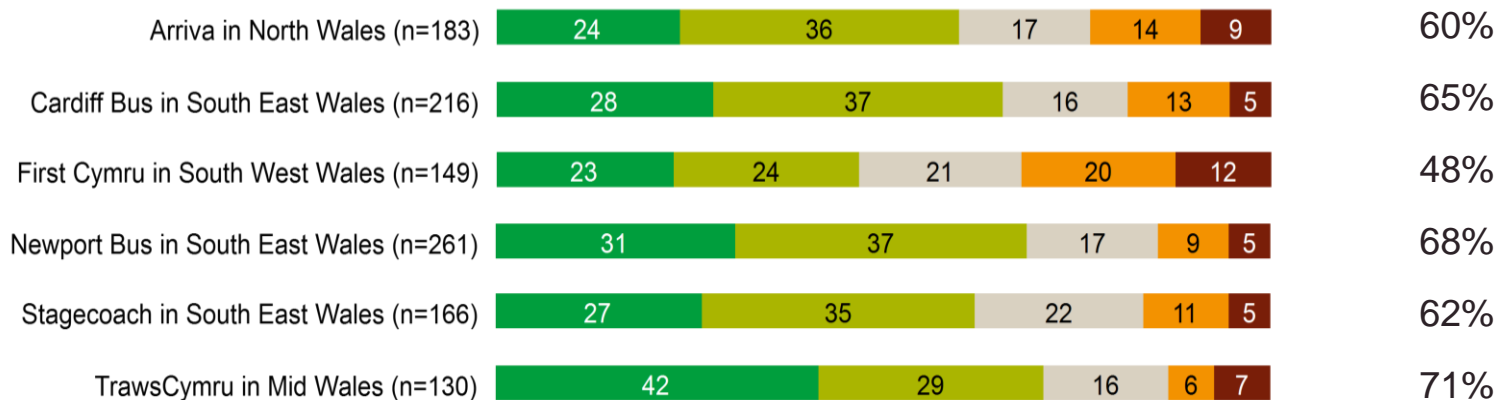
Wales

■ Very satisfied
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Total very and fairly satisfied

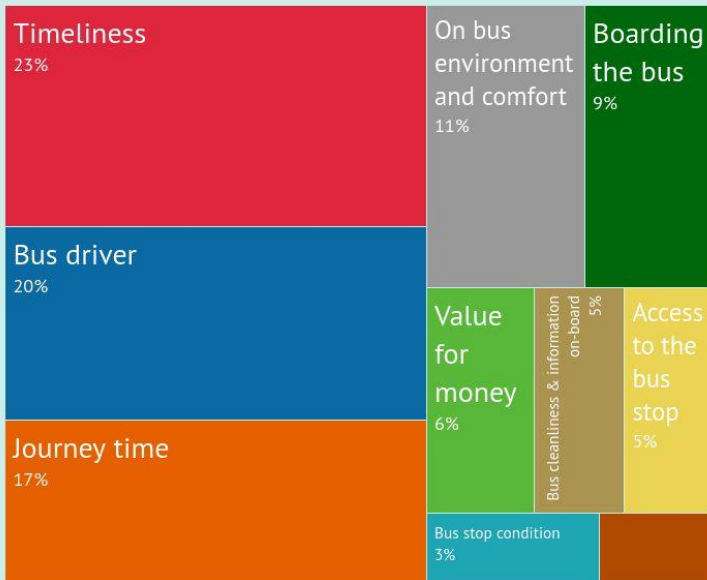


Wales operators



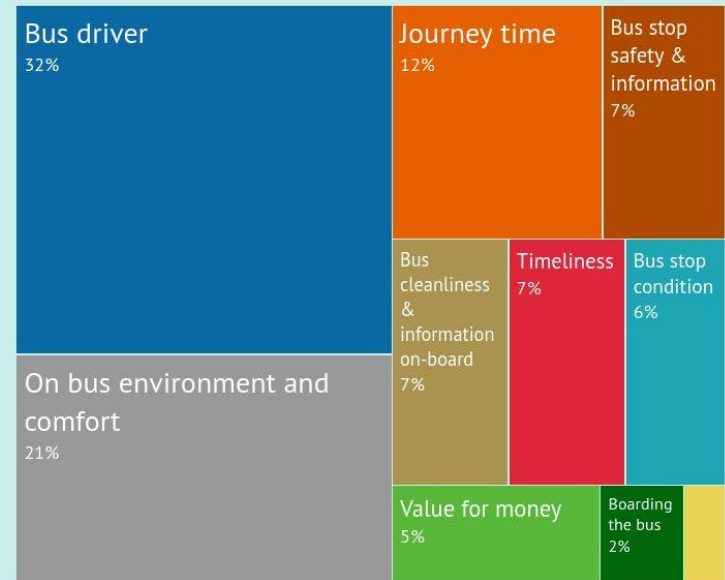
Overall experience: what makes a satisfactory or great journey?

What makes a satisfactory journey?



infogram

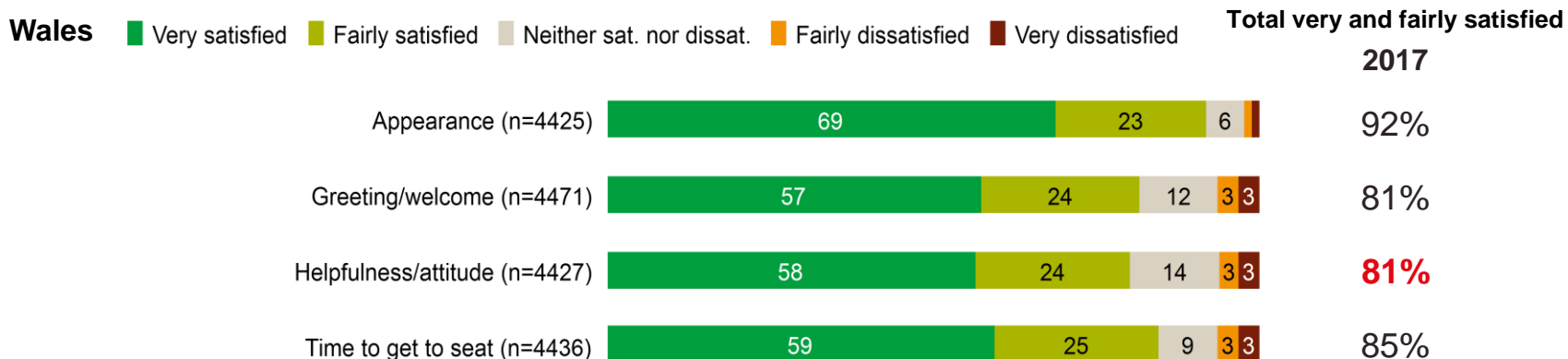
What makes a great journey?



infogram

Boarding: bus driver interaction

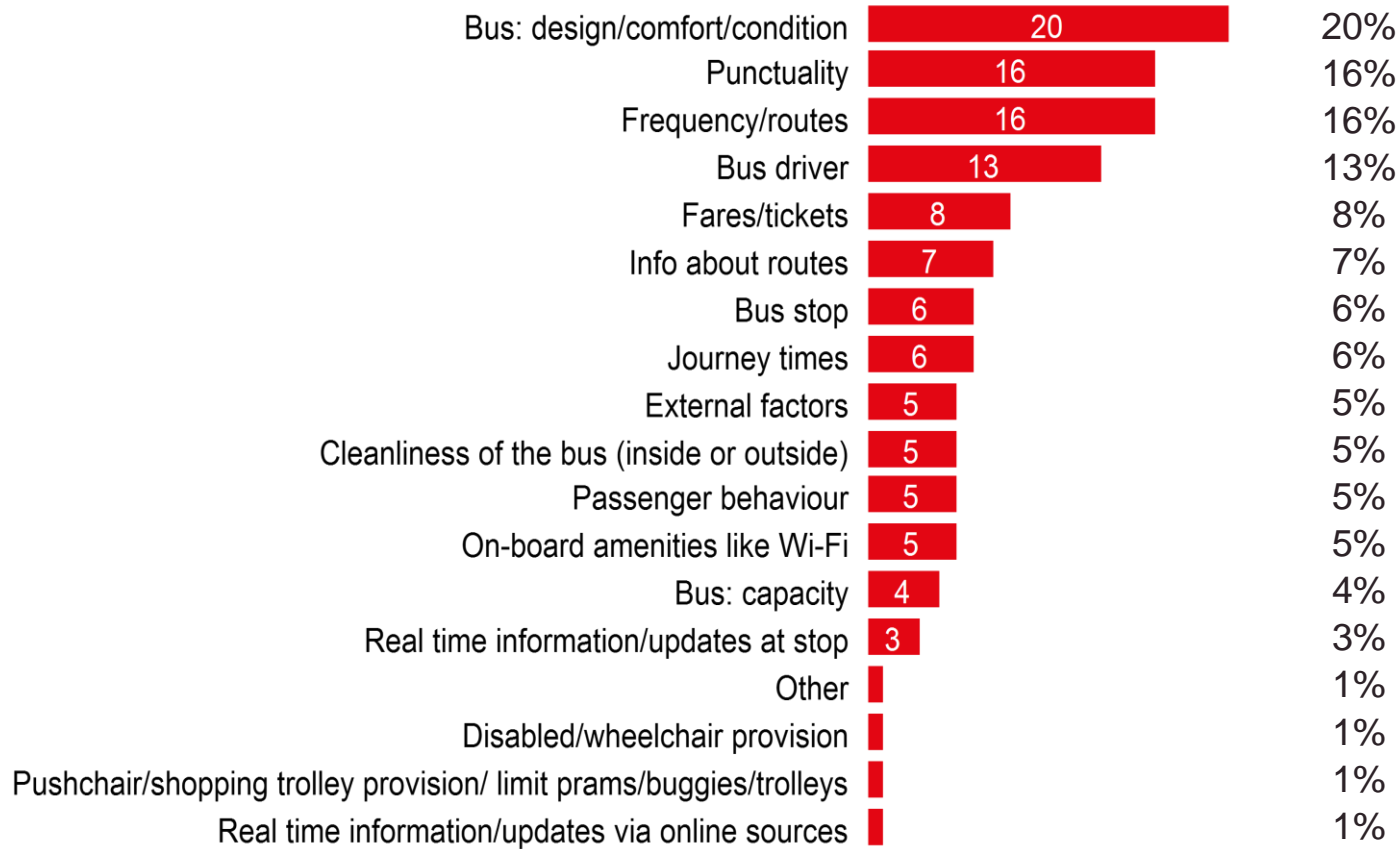
Customer service is crucial for passenger satisfaction



WALES OPERATORS	Driver helpfulness and attitude	Safety of the driving
Arriva	74%	89%
Cardiff Bus	81%	91%
First Cymru	83%	92%
Newport Bus	75%	87%
Stagecoach	79%	88%
TrawsCymru	87%	93%

Overall experience: what could be improved?

What could be improved - proportion of all those stating an improvement area



Key points

- **Value for money** depends on delivering the basics consistently as well attractive fares and season tickets
- **Punctuality is key** – work together to alleviate congestion and speed up journeys, especially for the afternoon peak
- **Good quality information** to support services before, at stops and during the journey – especially audio/visual, real-time and fares
- **Attention to the environment** – at stops and on-board

Most of all...

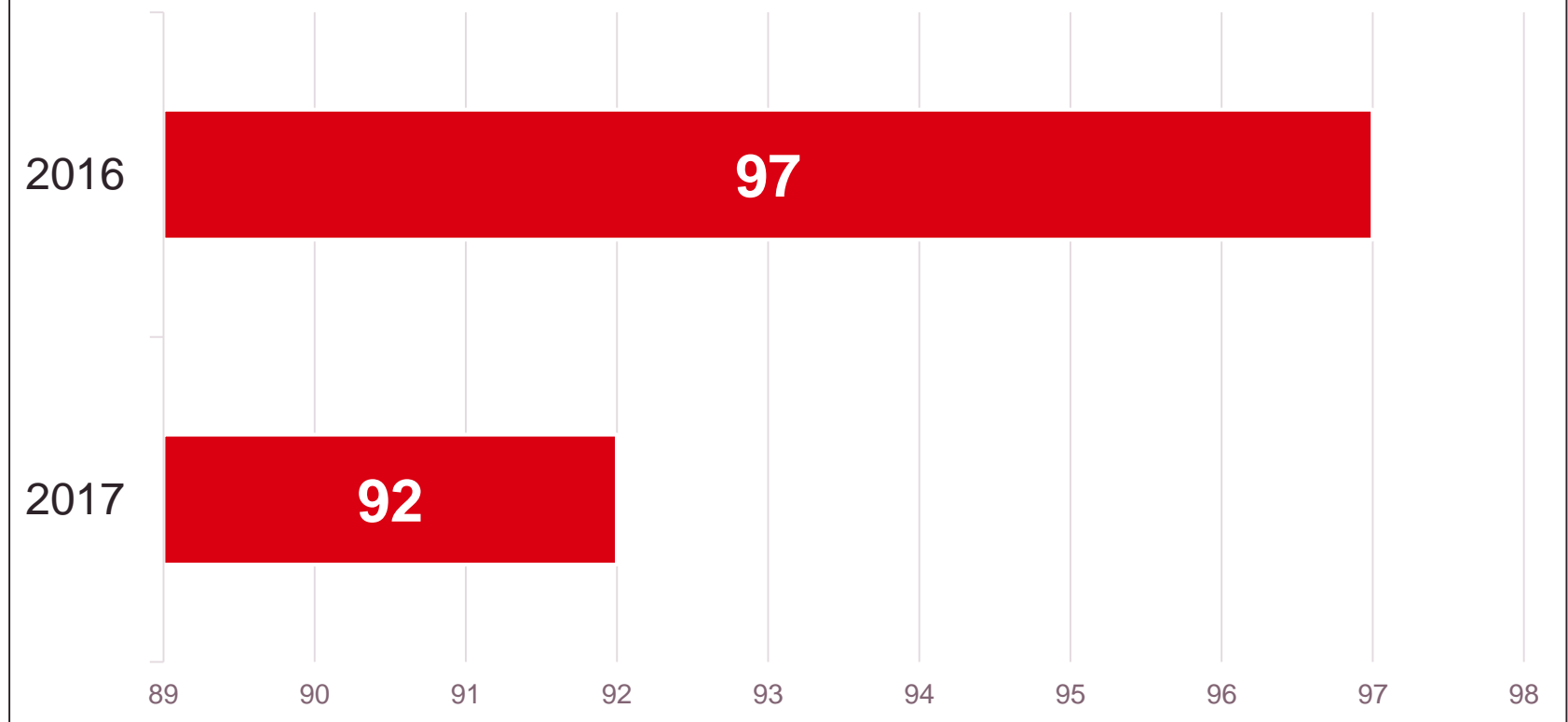
- **Bus driver customer service** is crucial to passenger satisfaction and delivering a great journey

Mystery travelling survey



Mystery travelling survey

Was there a kerb at the bus stop?

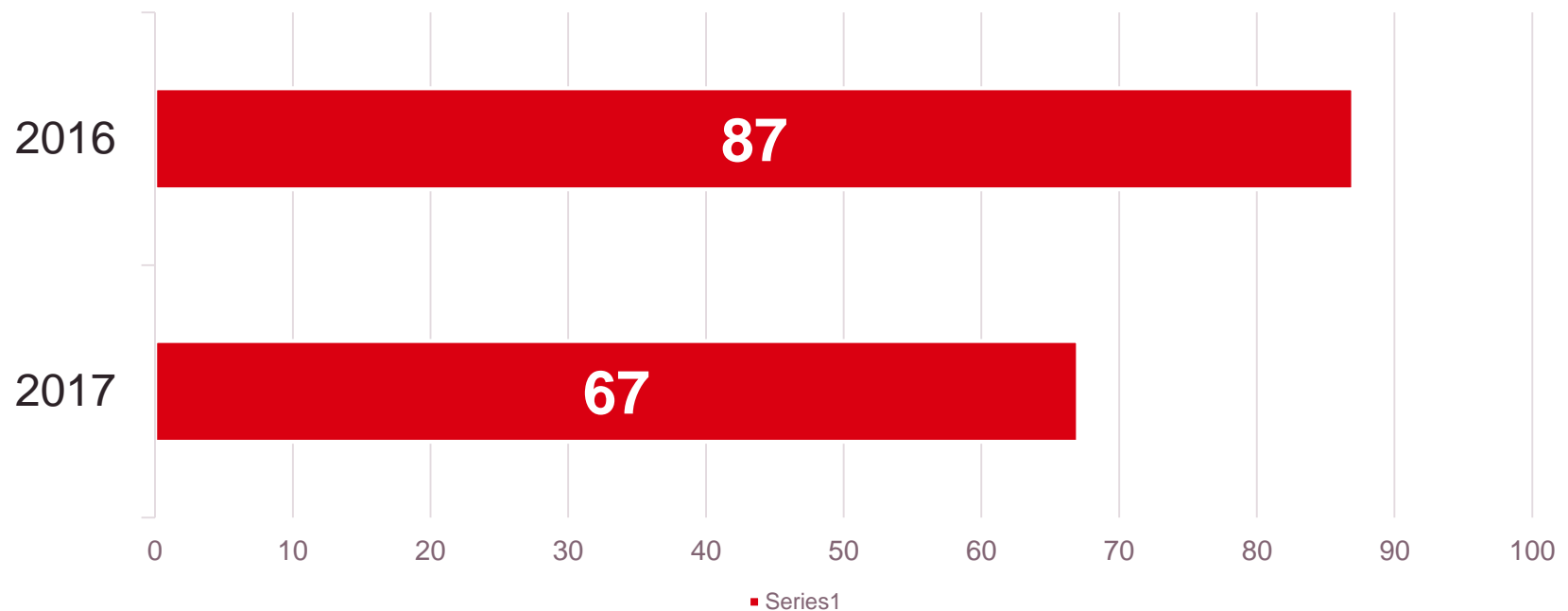


Mystery travelling survey



Mystery travelling survey

Was the location name shown at the bus stop?

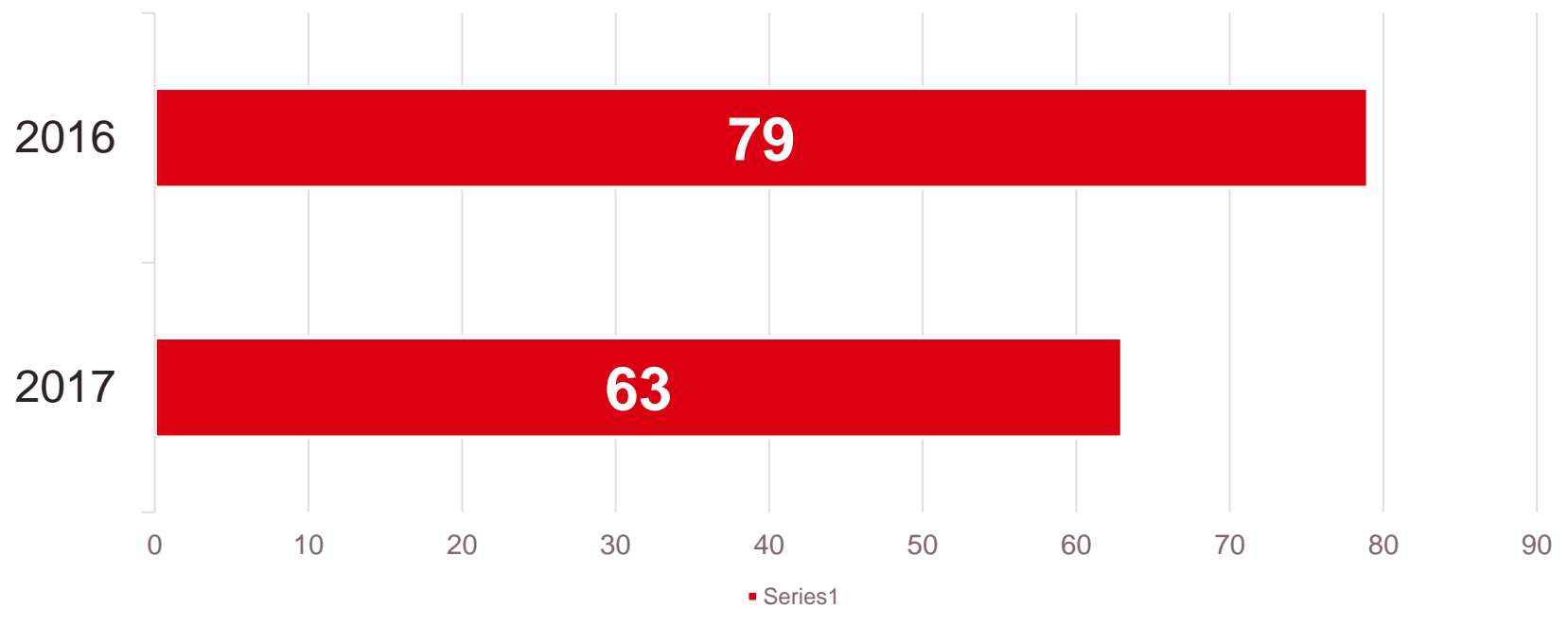


Mystery travelling survey



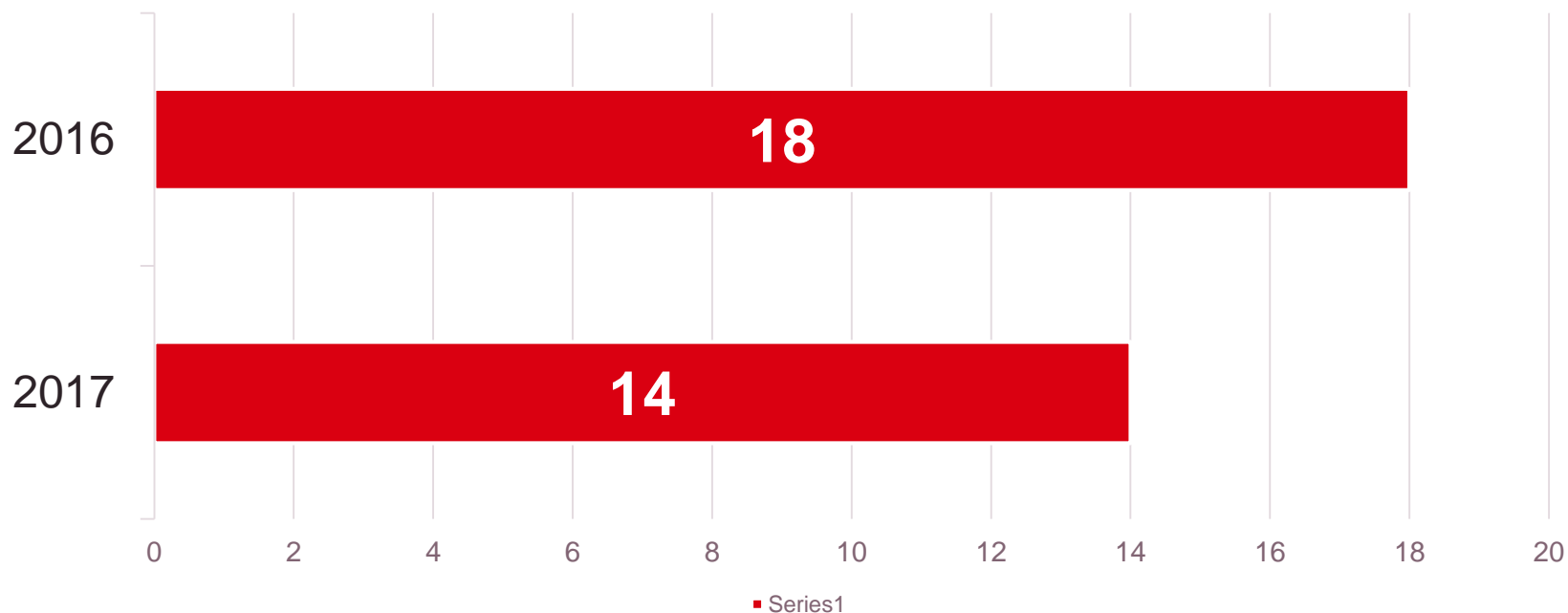
Mystery travelling survey

Does the stop have the Traveline phone number



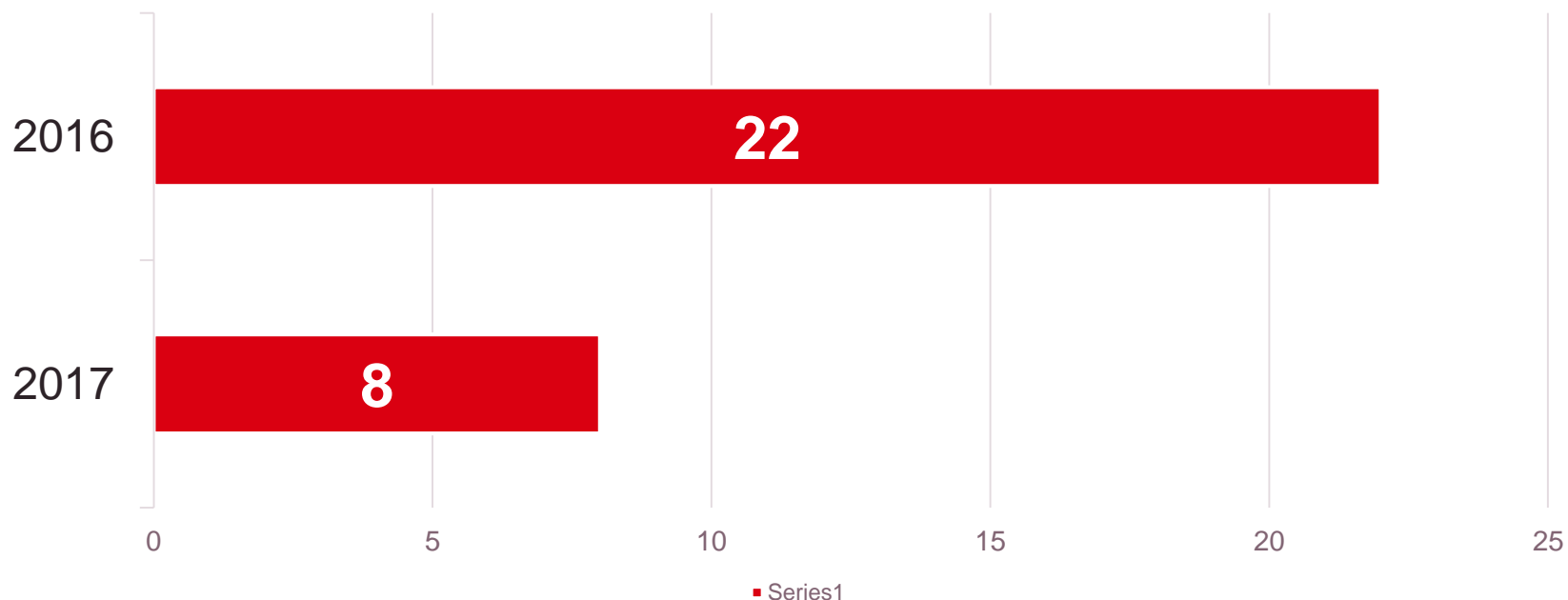
Mystery travelling survey

Was there a vicinity map on timetable display?



Mystery travelling survey

Was there a diagrammatic stick map on display?

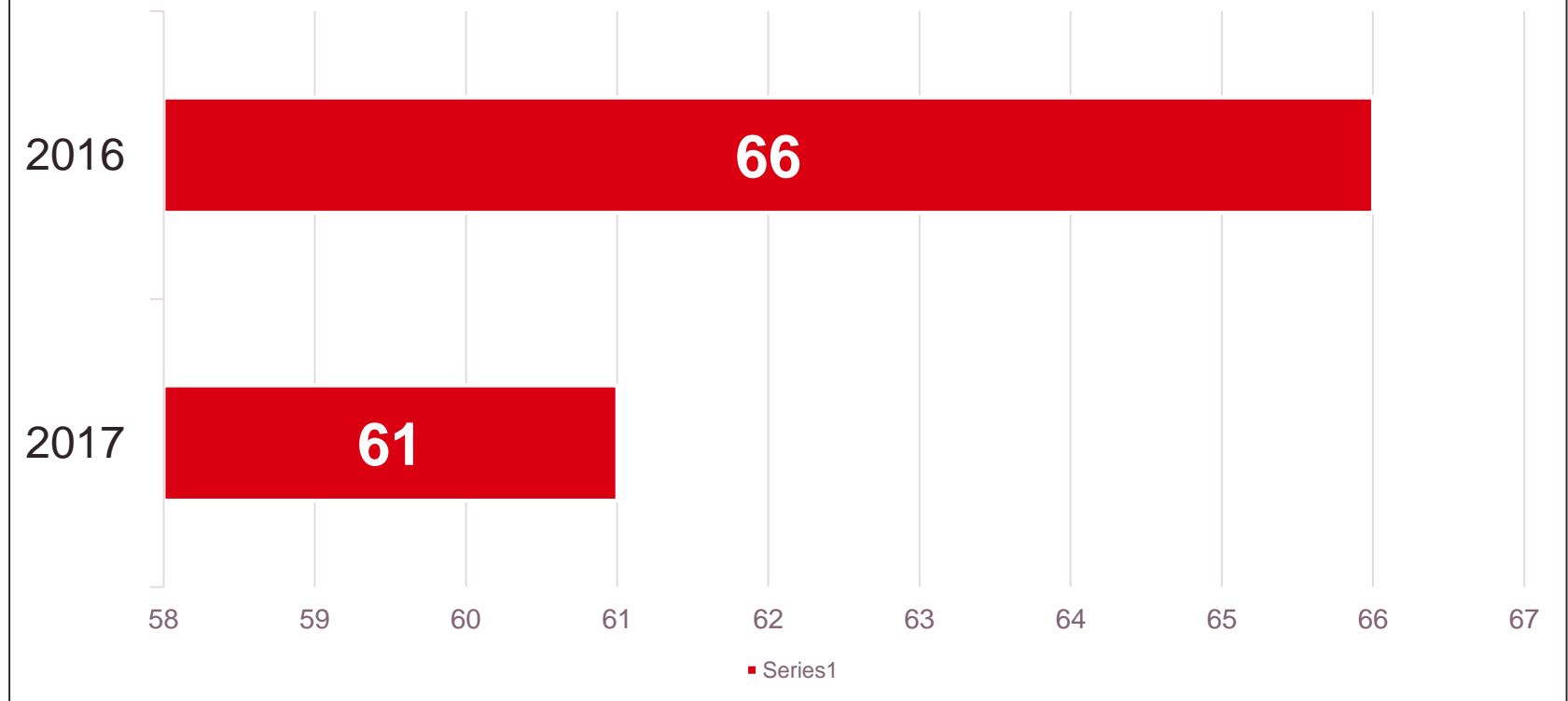


Mystery travelling survey



Mystery travelling survey

Was there a waiting restriction?



Mystery travelling survey



Mystery travelling survey



Thank you
Further information

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