



Getting more and happier passengers on your service

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Transport Focus – evidence based consumer organisation

Independent consumer watchdog promoting the interests of transport users across Great Britain: rail, bus, tram, coach, strategic roads

Using evidence from our research to give voice to users' issues and priorities for improvement; informing our work with service providers across the industry

Key results come from our major tracking surveys:

- **National Rail Passenger Survey**
- **Bus Passenger Survey**
- **Tram Passenger Survey**
- **Strategic Roads User Survey**

Plus further in-depth studies:

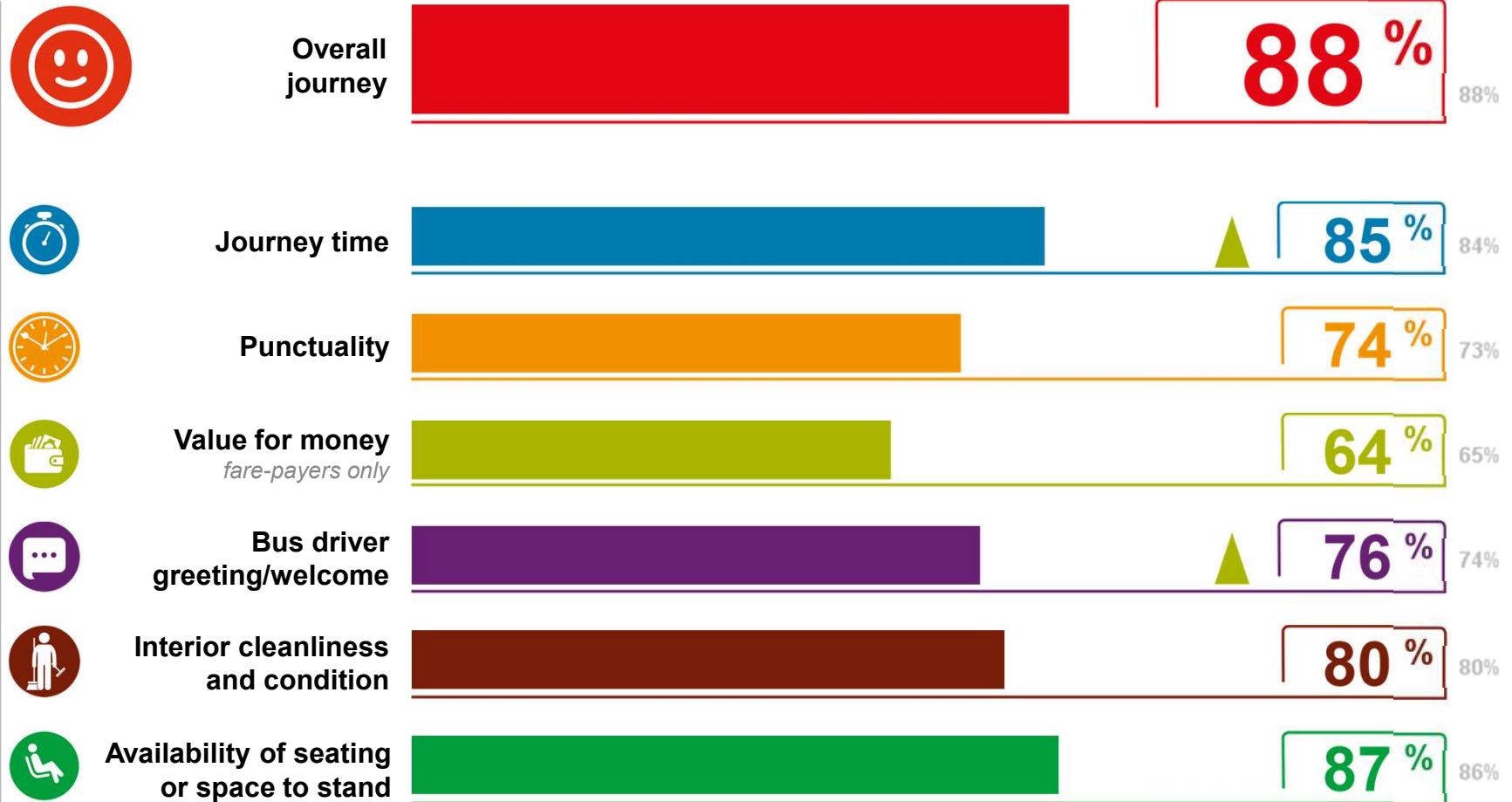
- **Passengers' priorities for improvement**
- **Getting to and from the airport: is coach an option?**

What I'll be talking about....

- Current levels of satisfaction amongst bus passengers – 2018/19 Bus Passenger Survey headline results (including Wales from 2017)
- Working in collaboration – bus alliances
- What factors deliver a good journey...but what makes that really great journey!?
- Planning for your future...what young people think about bus journeys

Bus Passenger Survey – autumn 2018

Headline results for England (outside of London) in 2018



Figures shown are total very or fairly satisfied.
Last year's figure shown in grey, where available.

Bus Passenger Survey – autumn 2018

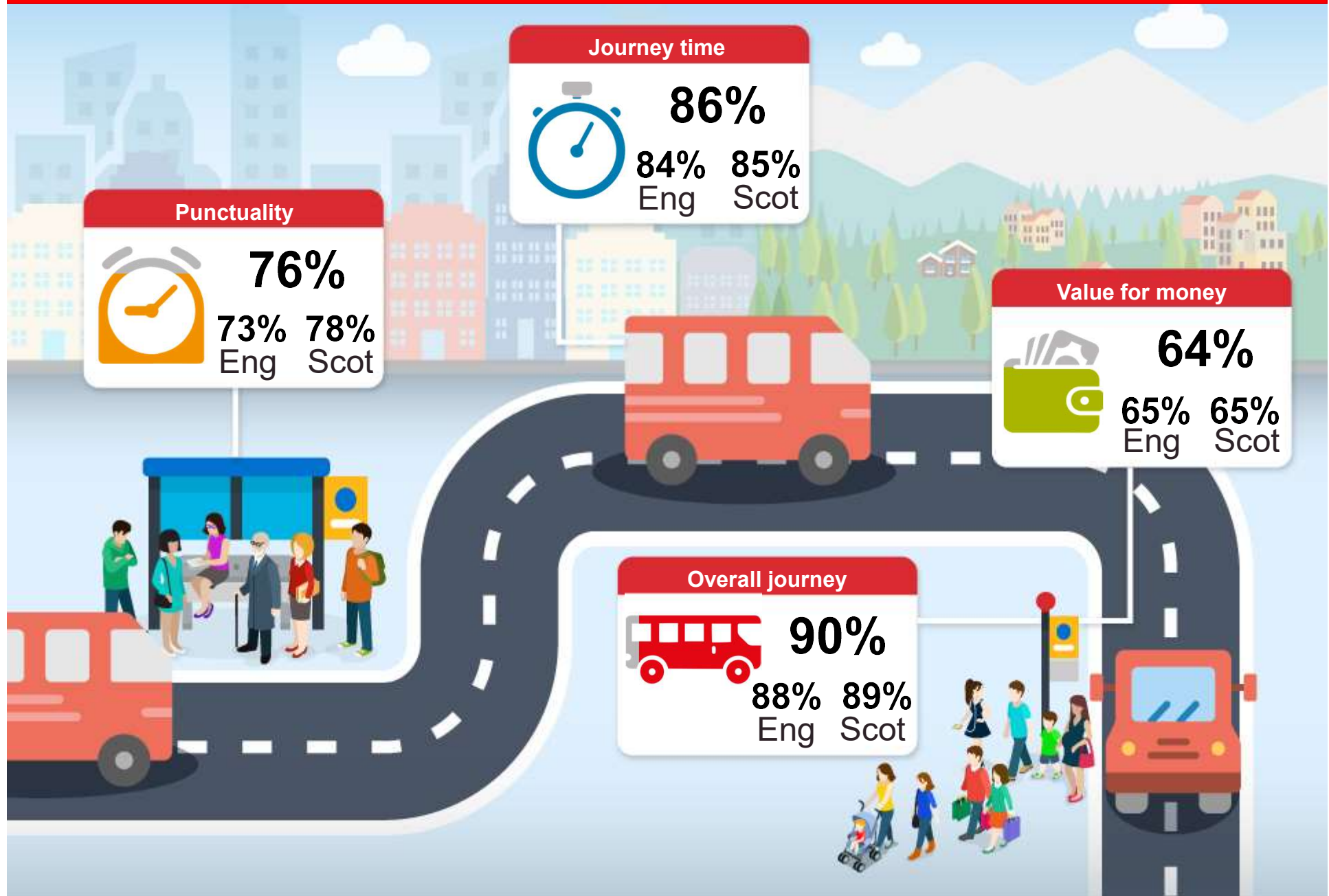
**Key measures: National operators vs top 5 ‘independents’
– Independents delivering satisfaction well**



BPS autumn 2018 Passenger satisfaction	Overall satisfaction	Value for Money	Punctuality	Journey time	Bus driver greeting	Clean interior
Arriva - England	87%	65%	72%	85%	75%	80%
First - England	83%	57%	66%	80%	70%	74%
Go Ahead	92%	64%	80%	88%	82%	84%
National Express - England	84%	66%	70%	82%	66%	73%
Stagecoach - England	90%	65%	75%	86%	79%	81%
Midland Classic - Staffordshire	95%	76%	84%	87%	90%	84%
Reading Buses	94%	71%	81%	89%	82%	83%
Trent Barton - Derbyshire	96%	63%	70%	84%	92%	90%
Trent Barton - Nottinghamshire	93%	58%	76%	89%	92%	91%
Warrington's Own Buses	93%	44%	71%	84%	76%	87%

Bus Passenger Survey Autumn 2017

Key performance measures for Wales and comparisons with England and Scotland



Bus Passenger Survey – autumn 2017

Key measures for national operators and ‘independents’ in Wales

BPS 2017 Wales Passenger satisfaction	Overall satisfaction	Value for Money	Punctuality	Journey time	Bus driver helpfulness
Arriva North Wales	87%	60%	65%	84%	74%
First Cymru	92%	48%	81%	86%	83%
Stagecoach South Wales	90%	62%	73%	86%	79%
Cardiff Bus	89%	65%	76%	84%	81%
New Adventure Travel	89%		79%	93%	
Newport Transport	87%	68%	72%	79%	75%
Traws Cymru	94%	71%	88%	91%	87%

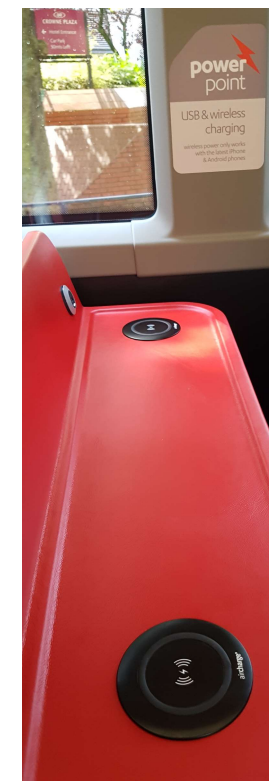
- Overall satisfaction is reasonably high
- Bus drivers are doing a good job
- More emphasis is needed on value for money and working together on punctuality



On the bus: availability of features inside the bus

– Passengers recognising WiFi, leather seats and charging points

		England (outside London) Trend figures			
	■ Yes - England	2018	2017	2016	2015
Free Wi-Fi ^A (n=34852)	41	41%	-	-	-
How to contact the bus company* (n=33856)	36	36%	35% ▼	38% ▲	19%
Fares/ticket info (n=33687)	30	30% ▼	33%	33% ▼	35%
Digital next stop display (n=34952)	29	29% ▲	23% ▲	21% ▲	19%
Leather seats ^A (n=34605)	27	27%	-	-	-
USB charging points ^A (n=33867)	25	25%	-	-	-
Audio announcements (n=34947)	22	22% ▲	17% ▲	15% ▲	12%
Route map/journey times (n=34037)	16	16%	17%	17% ▲	16%
Timetable (n=33284)	14	14%	14% ▼	15%	15%



Q. Were any of these items of information present on the bus?

A) A map of the bus route/journey times; B) Audio announcements e.g. saying the next stop; C) An electronic display e.g. showing the next bus stop; D) Information about tickets/fares; E) A timetable; F) Details of how to contact the bus company, for example, to make a complaint or find out information *(prior to 2016 was only how to make a complaint); G) Free Wi-Fi H) USB charging points; Leather seats ^Anew items in 2018.

Satisfaction with information on the bus

– Huge improvement with audio/visual facilities on board



Satisfaction with the information provided inside the bus - by availability of audio announcements

Total very and fairly satisfied

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



Yes (n=7427)



2018 2017 2016 2015

81% 81% 82% 81%
▲ ▲ ▲ ▲



No (n=21890)



63% 62% 61% 60%

Filter: Hierarchical Filter = England - Year = 2018

Satisfaction with the information provided inside the bus - by availability of digital next stop display

2018 2017 2016 2015



Yes (n=9558)



79% 79% 79% 77%
▲ ▲ ▲ ▲



No (n=19305)



62% 61% 60% 60%

Filter: Hierarchical Filter = England - Year = 2018

Arrows indicate a statistically significant difference in ratings for information provision by availability of facilities

Q. Thinking about whilst you were on the bus, please indicate how satisfied you were with the following?
 B) The information provided inside the bus.

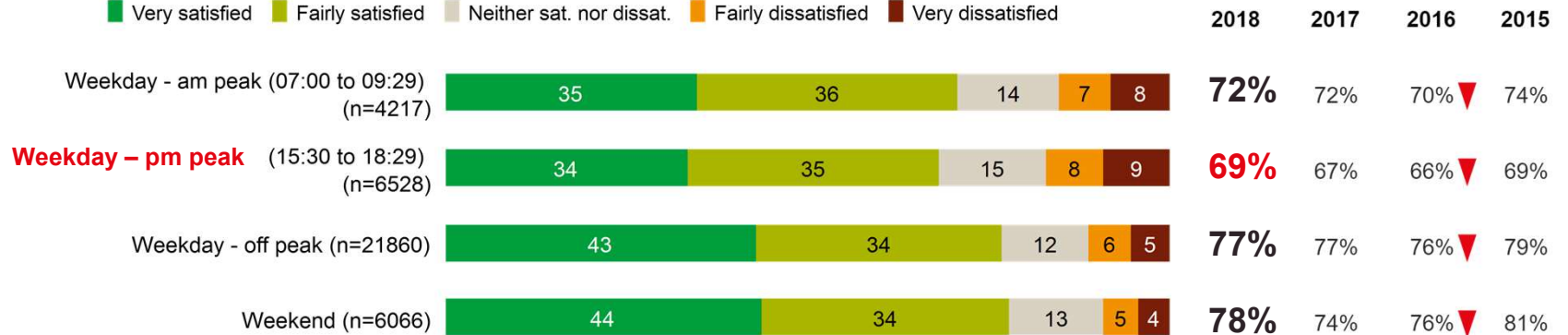
Waiting: waiting time and punctuality by travel time

– Congestion causing particular strain in the pm peak



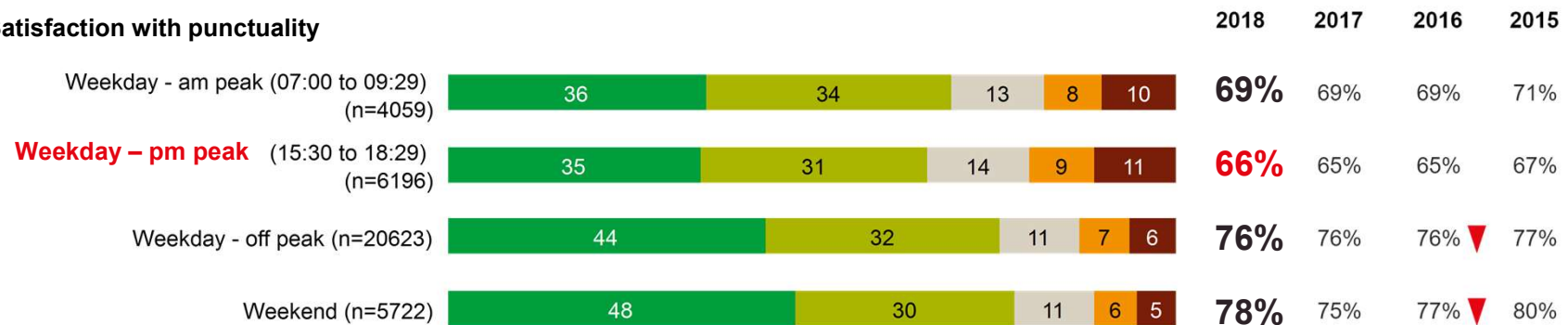
Satisfaction with waiting time

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



Filter: Hierarchical Filter = England - Year = 2018

Satisfaction with punctuality



Filter: Hierarchical Filter = England - Year = 2018

Q. How satisfied were you with the following at the bus stop: A) The length of time you had to wait for the bus; B) The punctuality of the bus.

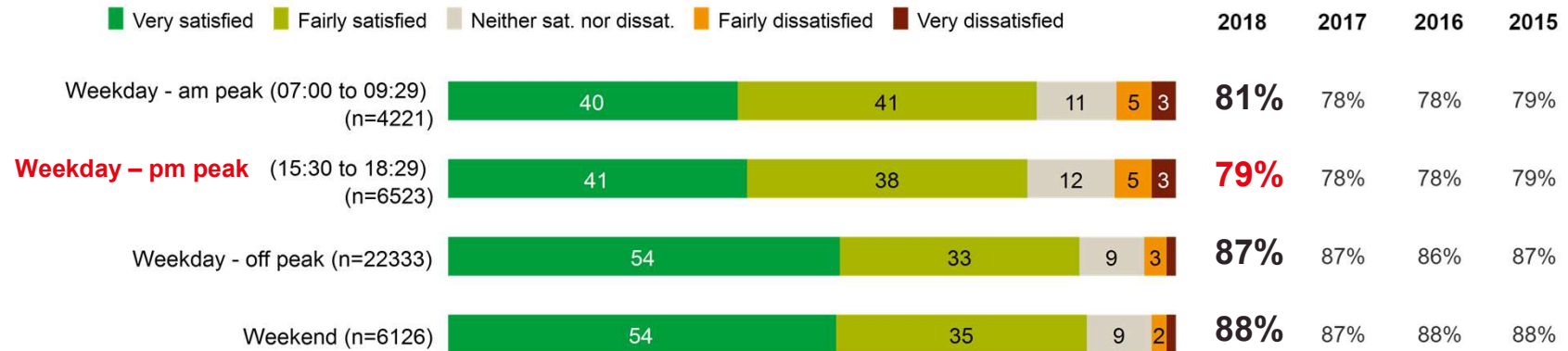
On the bus: journey time by travel time

– Congestion is the number one cause of slower journeys



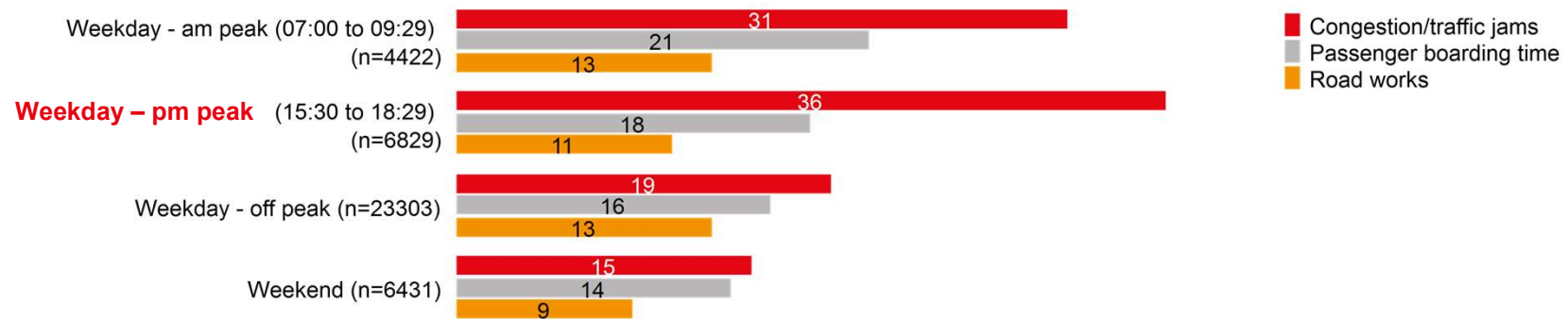
Satisfaction with on-bus journey time

Total very and fairly satisfied



Filter: Hierarchical Filter = England - Year = 2018

What affected journey time?



Filter: Hierarchical Filter = England - Year = 2018

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

Q. Was the length of time your journey took affected by any of the following? [note: multiple responses permitted]

Congestion can only be addressed by working in collaboration

– Bus Alliances leading the work

Working together is crucial to resolving wider issues and securing investment for passengers. Transport Focus is leading some:

- Charing West Midlands Bus Alliance
– currently working on ‘50 deliverables’
- Co-chairing Mayor of Bristol’s Transport Board – tackling congestion

Engaging with others:

- Liverpool City Region Bus Alliance
- West Yorkshire Bus Partnership
- Greater Manchester Mayor’s Transport Board

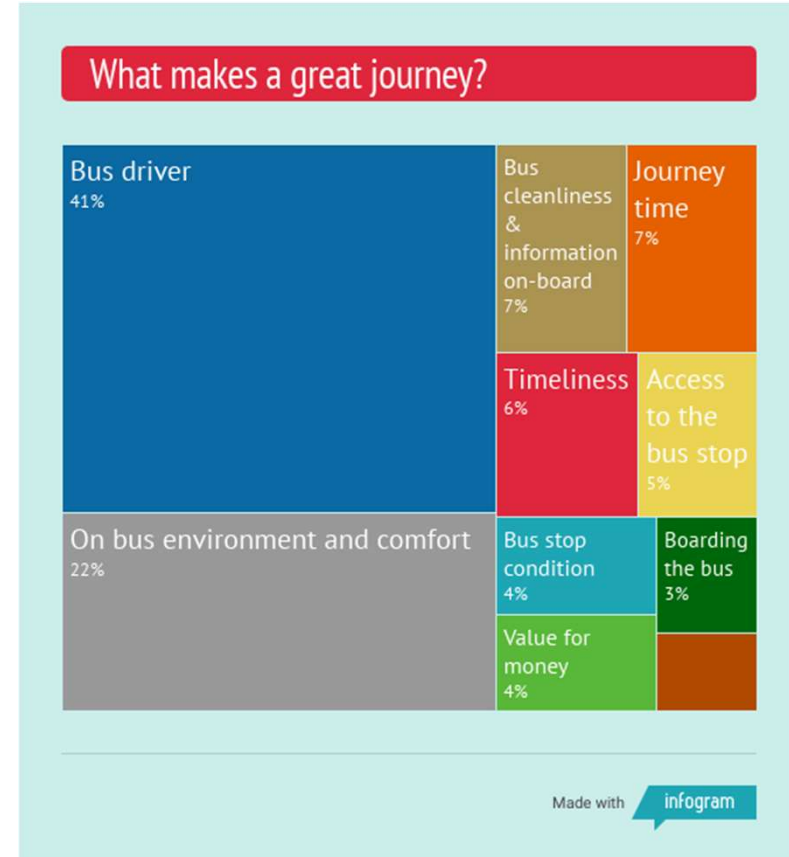
Working across other regions to build further alliances...



Overall experience: what makes a satisfactory or great journey?

– Bus Driver customer service is the key to a great journey

England (outside London)



Key Driver Analysis' looks at **fare paying passengers'** overall journey satisfaction response and their response to the 31 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 left hand chart shows which themes most differentiate between those not satisfied and satisfied overall – making a journey 'satisfactory'. The right hand chart shows which themes most differentiate between those fairly and very satisfied overall – making a 'great' journey.

Crucial role of the Bus Driver

Bus drivers make the key difference between an 'OK' journey and a **GREAT** journey

- Largely the only representative of the bus service passengers will see
- More emphasis needed on customer service skills consistently across the workforce
- Friendly and engaging when passengers board and leave – only have a few seconds!
- Particular reassurance for young people and infrequent users
- Proactive communication support during delays and disruption



Making bus a better choice for young people

– Summary from Transport Focus workshops

- Young people don't feel services are designed with them in mind
- Not knowing how the system works or what to do is a barrier and source of anxiety about 'getting it right'
- Improving journey experience is important – young people notice poor quality provision
- There is a need to design systems better; learning from other industries in the way they appeal to young people
- Fares for young people are often confusing and inconsistent

Ground-breaking work and knowledge-sharing is growing:

- Offering simple flat fares for under-16s and re-branding ID cards
- Youth transport groups and easing transition to secondary schools
- Providing real-time information and reducing anxiety for parents

Key points

- Overall satisfaction is good – particularly with smaller independent operators
- Satisfaction with information on-board hugely lifted by audio/visual provision
- Particular issues with congestion especially afternoon peak – needs collaboration to resolve – alliances are a good model
- Bus drivers are the key to a great journey – need more consistency
- Young people face particular barriers and need bus to work better for them.

What could you do to deliver improvement?

