

transportfocus 

 **BVA** BDRC-

Bus Passenger Priorities 2019 (Users' priorities)

Publish February 2020

Methodology and key subjects covered



Methodology

- Online survey targeting a nationally representative panel base and achieving 7,546 completes.
- Fieldwork ran from end March to early April 2019.
- To qualify, respondents had to be living in England (outside London).
- This report analyse the usage and priority of 3 distinct groups:

Bus users (n=5,000) use bus at least once every 3 months and being at least 20 years old (close to national representativeness by age)

Non users (n=1,700) use bus less than once every 3 months includes c100 youth non users (proportionally weighted by age)

Youth users (n=846) 14 to 19 years old who use bus at least once every 3 months (close to national representativeness by age)



Topics covered

- Priorities for improvement
- Attitudes to buses and general satisfaction with aspects of travelling by bus
- Opportunities to increase usage
- Environmental view of buses

Bus users

Key findings – bus users

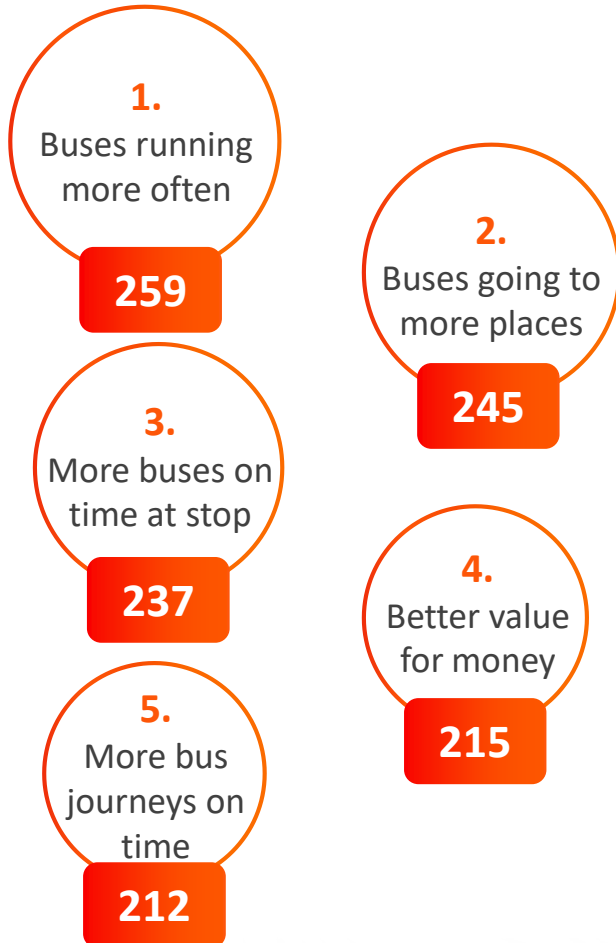
- The top three priorities centre on the bus network: ‘running more often’; ‘going to more places’; and ‘more on time at stop’. Value for money was fourth followed by ‘more journeys on time’ fifth.
- The priorities for improvement are fairly consistent by age group except for those age 35 to 64 where ‘value for money’ comes through more strongly.
- Improvements associated with ‘the bus itself’ are second to ‘the bus network’ related improvements.
- Their attitude towards bus is generally positive; less than half agreed with the statement “I only use buses if I have to”.
- Around three fifths of users can access a car frequently and make regular journeys using the car. Around 3 in 10 of these users said ‘all or most’ of their car journeys could be made by bus. However this group attitudinally were also a little more averse to buses.
- Around half of users felt buses could play a reasonable role in reducing air pollution.

The top priorities for improvements are buses running more often, going more places and being on time

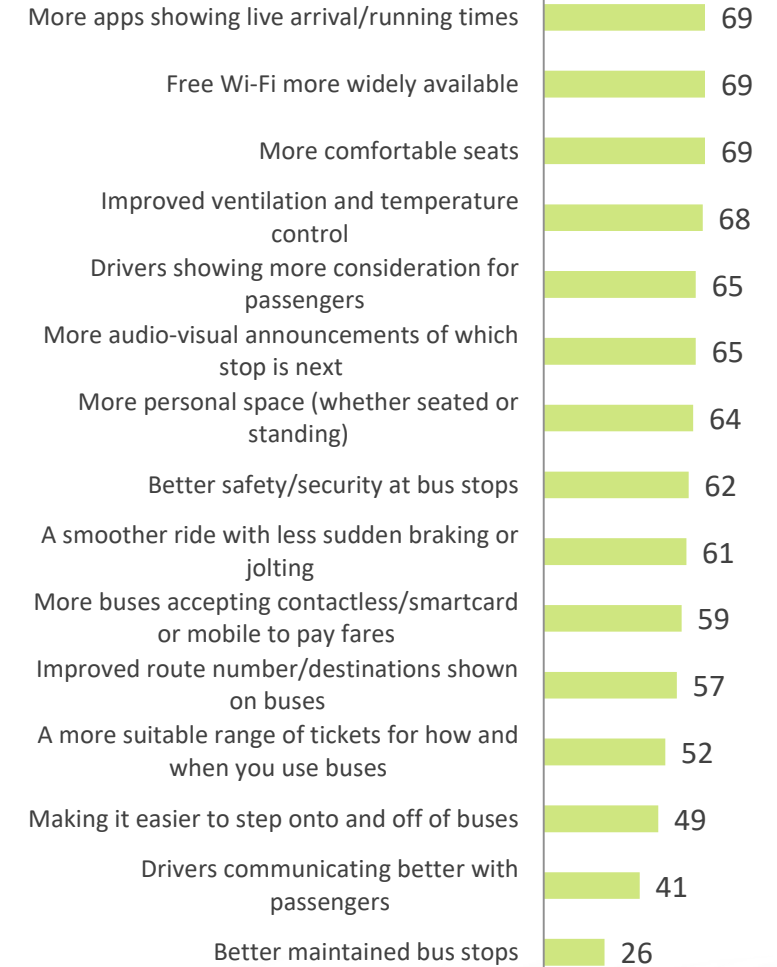
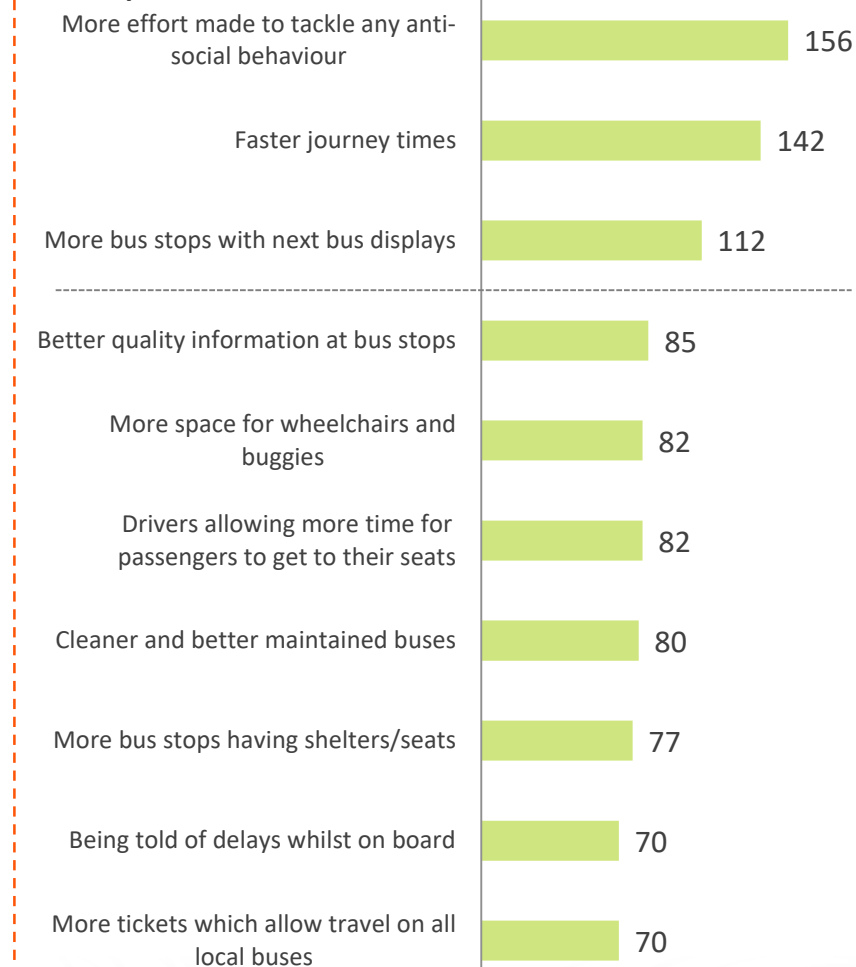
Priorities for improvement: users

Although the cost of taking the bus is one of the strongest pain points, it is only the 4th priority

Top priorities



Other priorities



Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
Base: All bus users (20+): 5,000

Things about improving the bus network is by far the top priority for bus users

Priorities for improvement: users

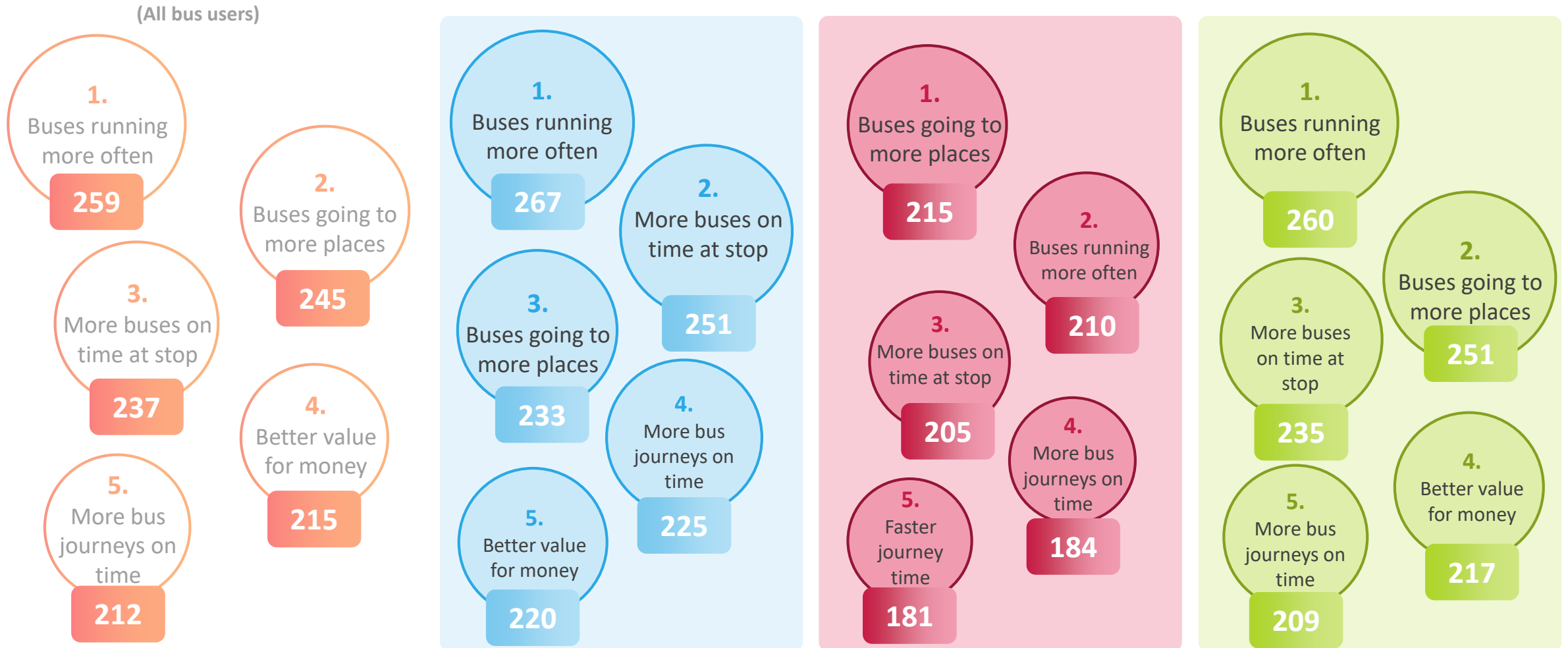


Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
 Base: All bus users (20+): 5,000

Top 5 priorities by passenger type are very similar

Priorities for improvement: users

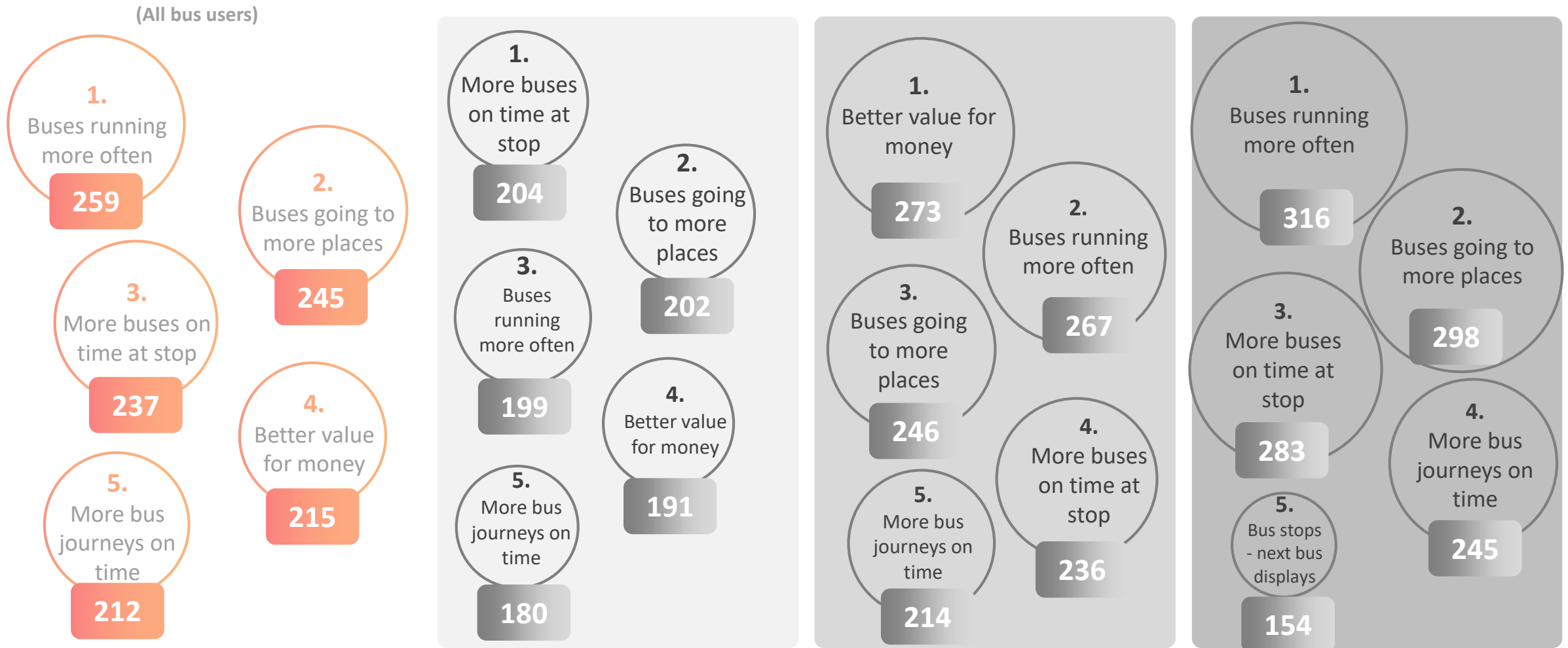
Although for Education passengers – faster journey time makes the top 5



Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
 Base: All bus users (20+): 5,000 / Commuters: 1,178 / Education: 247 / Leisure: 3,575

Priorities for 20-34 year olds are very closely aligned, but for 65+ their priorities that stand clearly apart around: buses running more often, going to more places and being more punctual.

Priorities for improvement: users



Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important

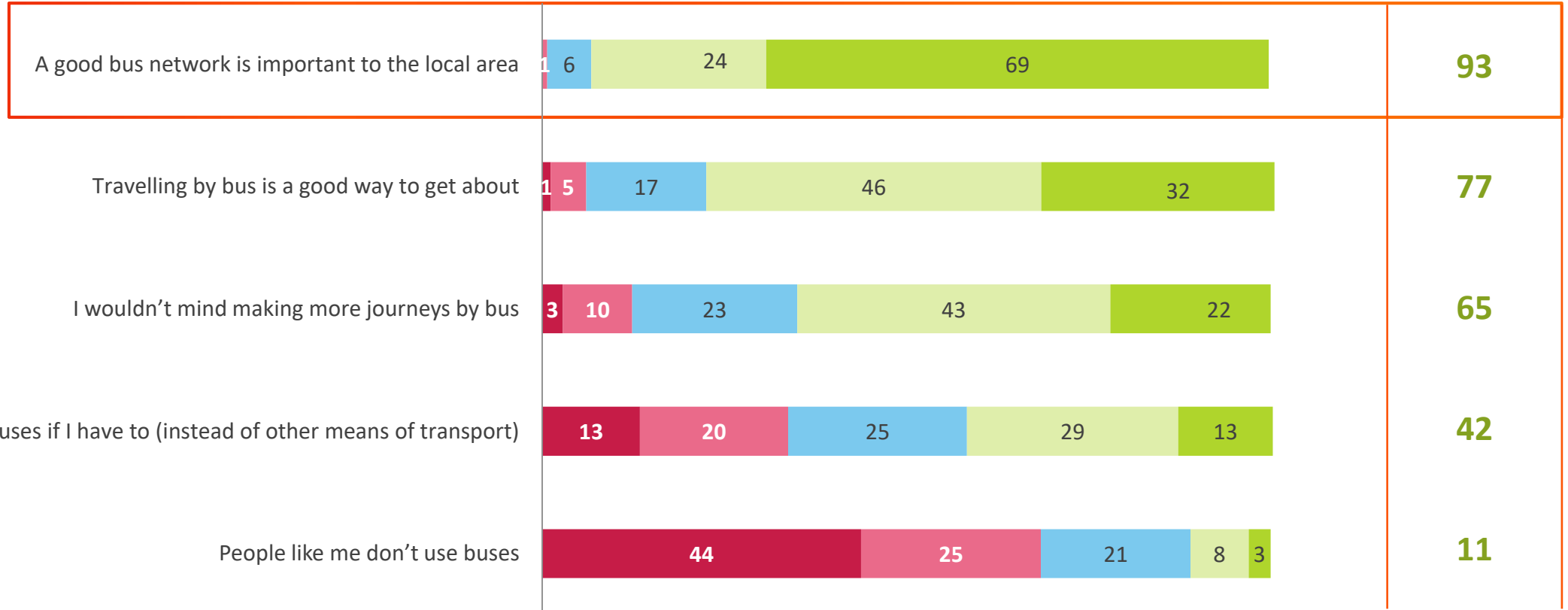
Base: All bus users (20+): 5,000 / 20-34: 1,230 / 35-64: 2,643 / 65+: 1,037

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A good bus network being important to the local area is an almost universal view

Agreement with statements about travelling by bus users (%)

Net agree



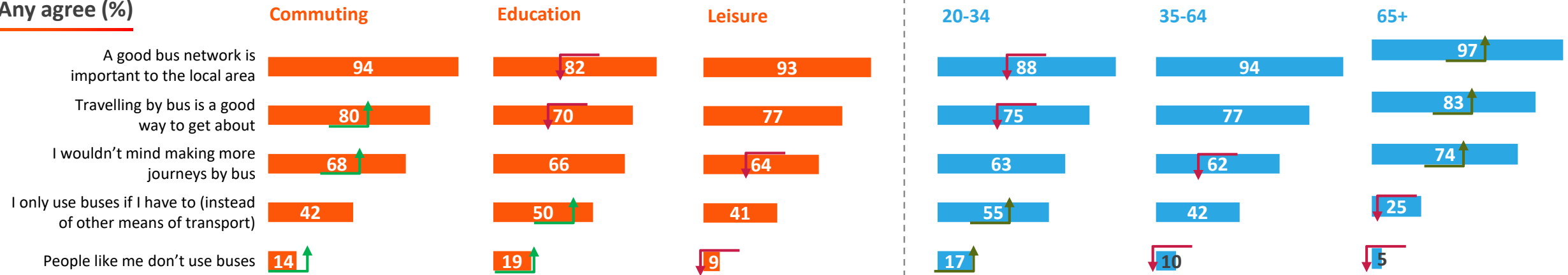
■ Strongly disagree
 ■ Somewhat disagree
 ■ Neither agree nor disagree
 ■ Somewhat agree
 ■ Strongly agree

Q10. To what extent do you agree or disagree with the following statements about travelling by bus?
 Base: All bus users (20+): 5,000

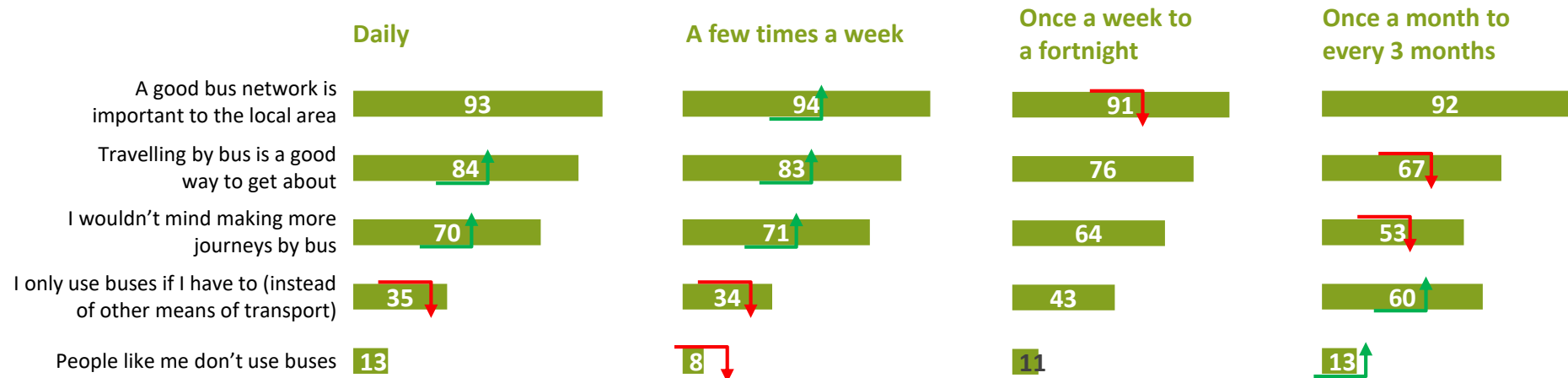
Heavier bus users more likely to feel bus is a good way to get about. Younger and less frequent bus users are more likely to say “use the bus only if I have to”

Attitude to buses - users

Any agree (%)



Any agree (%)



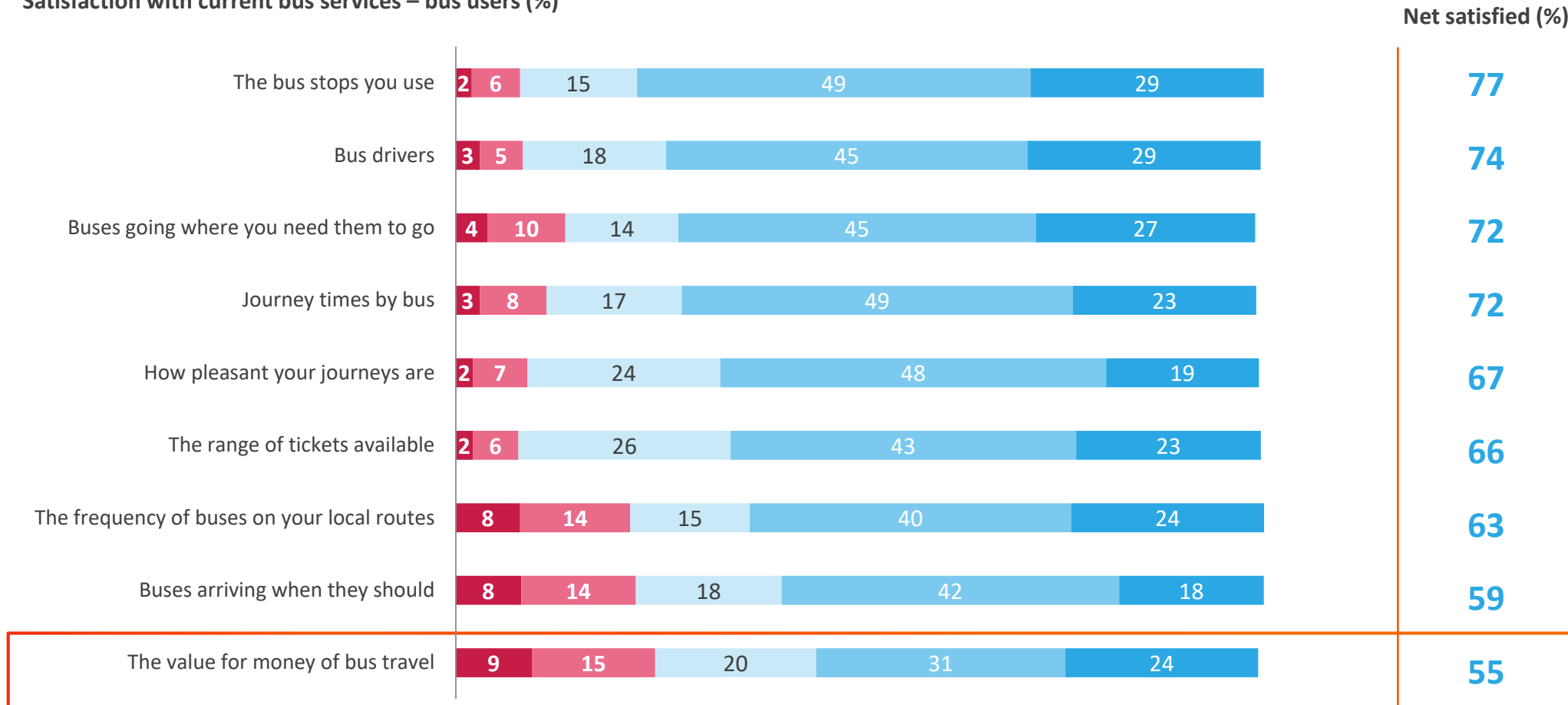
Q10. To what extent do you agree or disagree with the following statements about travelling by bus? (strongly agree)
 Base: 20-34: 1,320 / 35-64: 2,643 / 65+: 1,037 / Commuters: 1,178 / Education: 247 / Leisure: 3,575
 Daily: 654 / A few times a week: 1,481 / Once a week to once a fortnight: 1,477 / Once a month to every 3 months: 1,388

Significant difference to bus users

Lower Higher

Value for money is the strongest pain point

Satisfaction with current bus services – bus users (%)



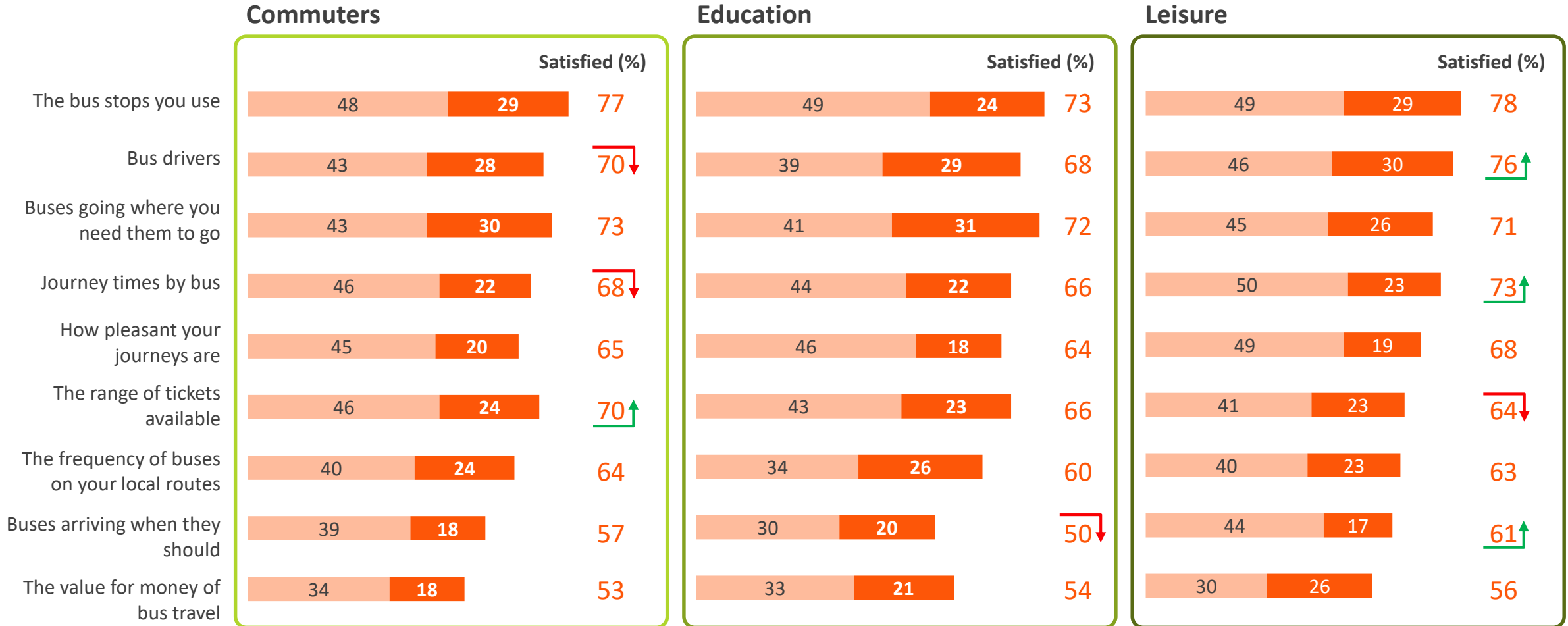
■ Very dissatisfied
 ■ Fairly dissatisfied
 ■ Neither satisfied/dissatisfied
 ■ Fairly satisfied
 ■ Very satisfied

Q23. Rating the bus services you use, how satisfied or dissatisfied are you with the following?
 Base: All respondents 20+ years old : 4,527-4,990

A clear divide between commuters and leisure users

General satisfaction - users

Journey time and bus drivers are the best performers for satisfaction amongst leisure users, but (taking the bus less often) are less satisfied with the range of tickets available. Commuter results contrast this: value for money is the biggest pain point



Q23. Rating the bus services you use, how satisfied or dissatisfied are you with the following?
 Base: Commuters: 1,073 / Education: 216 / Leisure: 2,921

Significant difference to bus users

Lower Higher

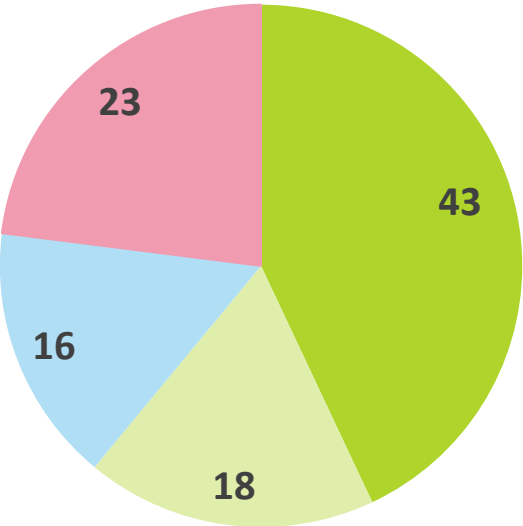


3 in 5 bus users have access to a car most of the time

Opportunities to increase usage

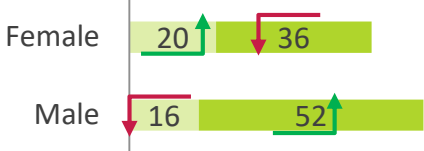
Older, male and leisure users are more likely to have a car available all the time

Bus user car access (%)

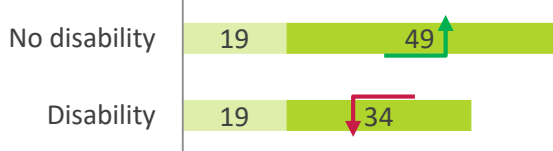


- All the time
- Majority of time
- Some of the time
- Rarely/never

Car access by gender (%)



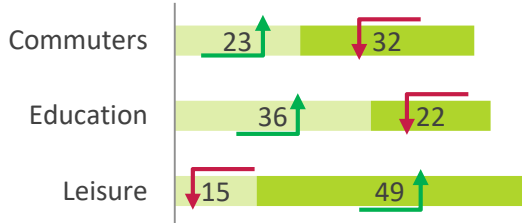
Car access by disability (%)



Car access by age (%)



Car access by passenger type (%)



Q27. How often is a car/motorbike available to you?
 Base: All respondents 20+ years old: 5,000 / Male: 2,390 / Female: 2,610 / 20-34: 1,320 / 35-64: 2,643 / 65+: 1,037
 Disability: 1,662 / No Disability: 1,949 / Commuters: 1,178 / Education: 247 / Leisure: 3,575

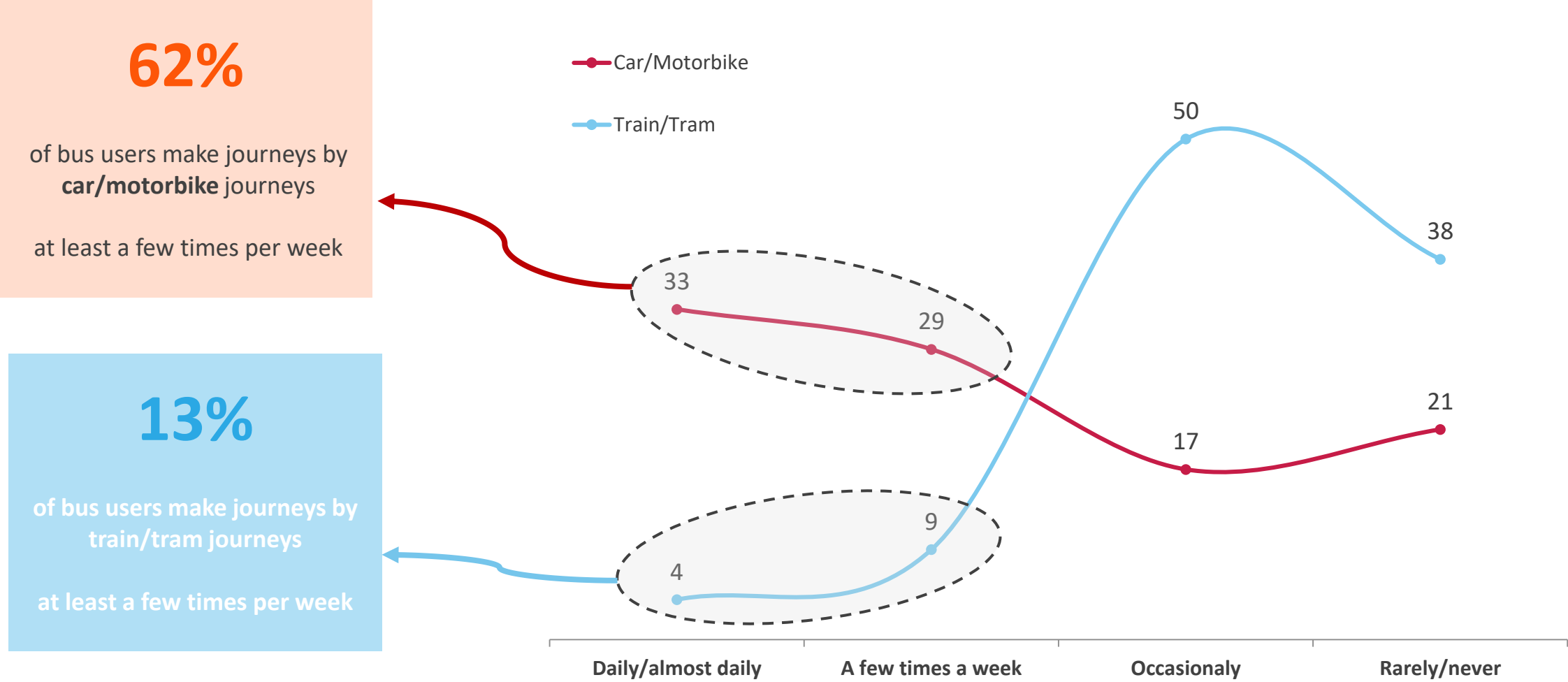
Significant difference to bus users

Lower Higher



Bus users make train journeys infrequently, but almost two thirds travel by car at least a few times per week

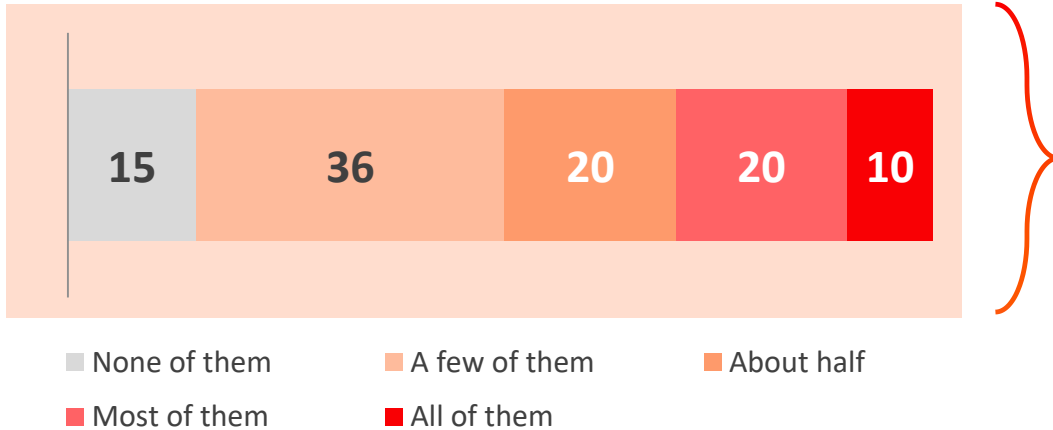
Opportunities to increase usage



Q7. In a typical week how frequently do you use the following modes of transport?
Base: All bus users (20+): 5,000

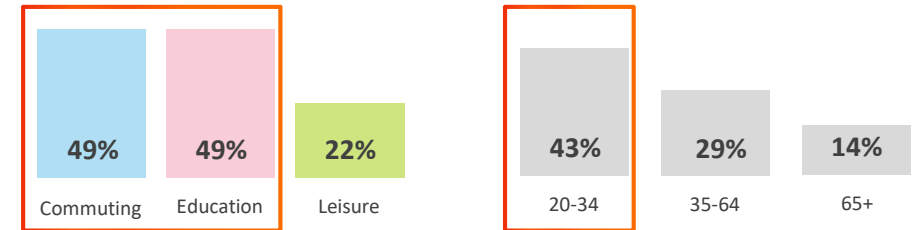
Of those 62% of users who also made car journeys often, one third feel most/all could be made by bus

% [users with car regular access] saying what proportion of their car/motorbike journeys could be made by bus



Opportunities to increase usage

All or most of their car journeys by bus user groups

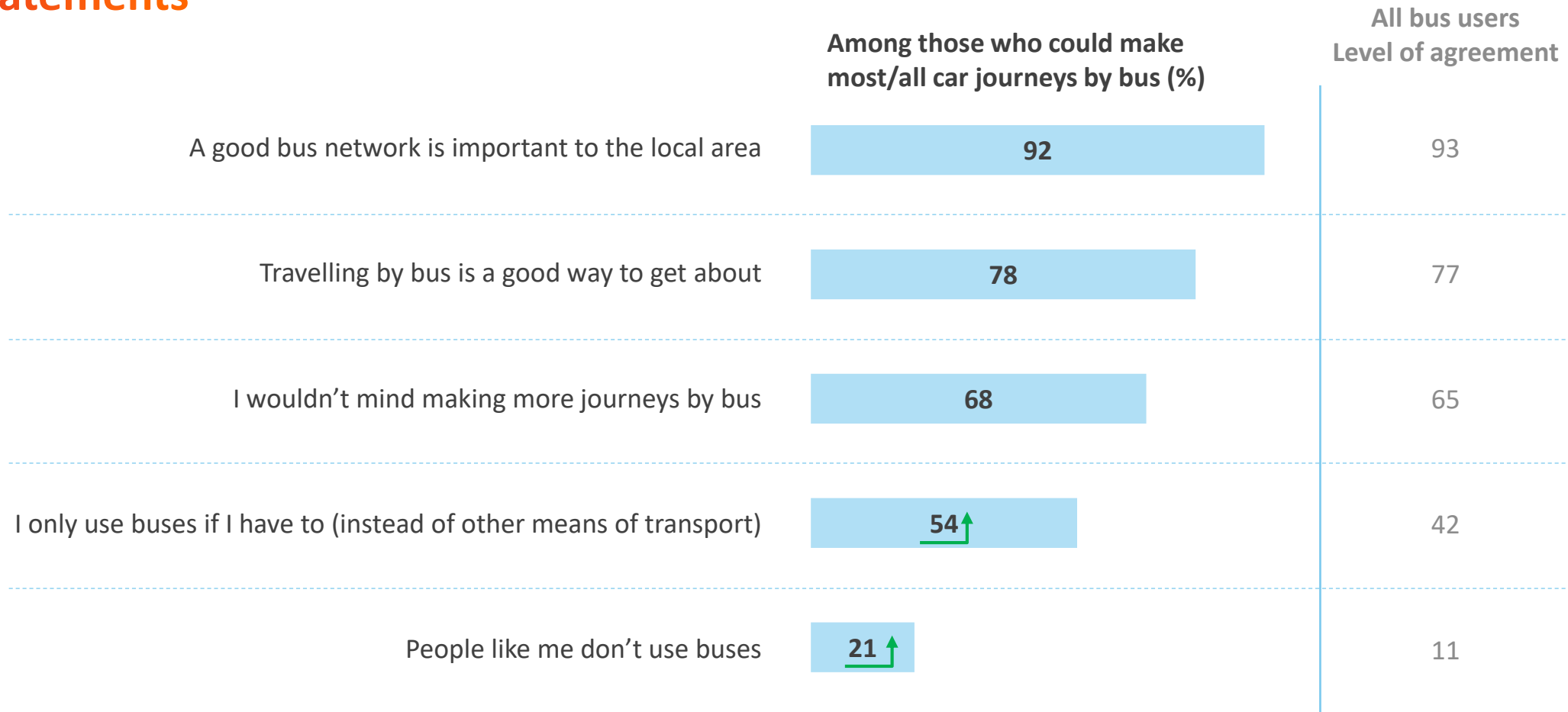


It shows bus is a feasible option for a fair proportion of car journeys.

It presents a substantial opportunity for bus; more so among commuters and younger users

Of those users who can make their car journeys by bus (the 1/3 of the 62%); they differ in attitude on the last two statements

Opportunities to increase usage



Significant difference to bus users

Lower Higher

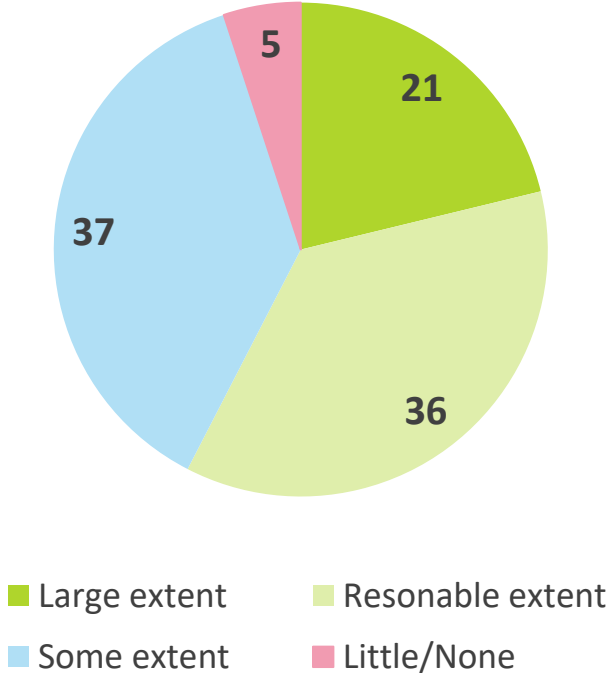
Q10. To what extent do you agree or disagree with the following statements about travelling by bus?
Base: All bus users (20+): 5,000

Half believe buses could play a part in reducing air pollution

Environmental view of buses

Older and less frequent users identify more with that statement

Extent buses can play a part in reducing air pollution (%)



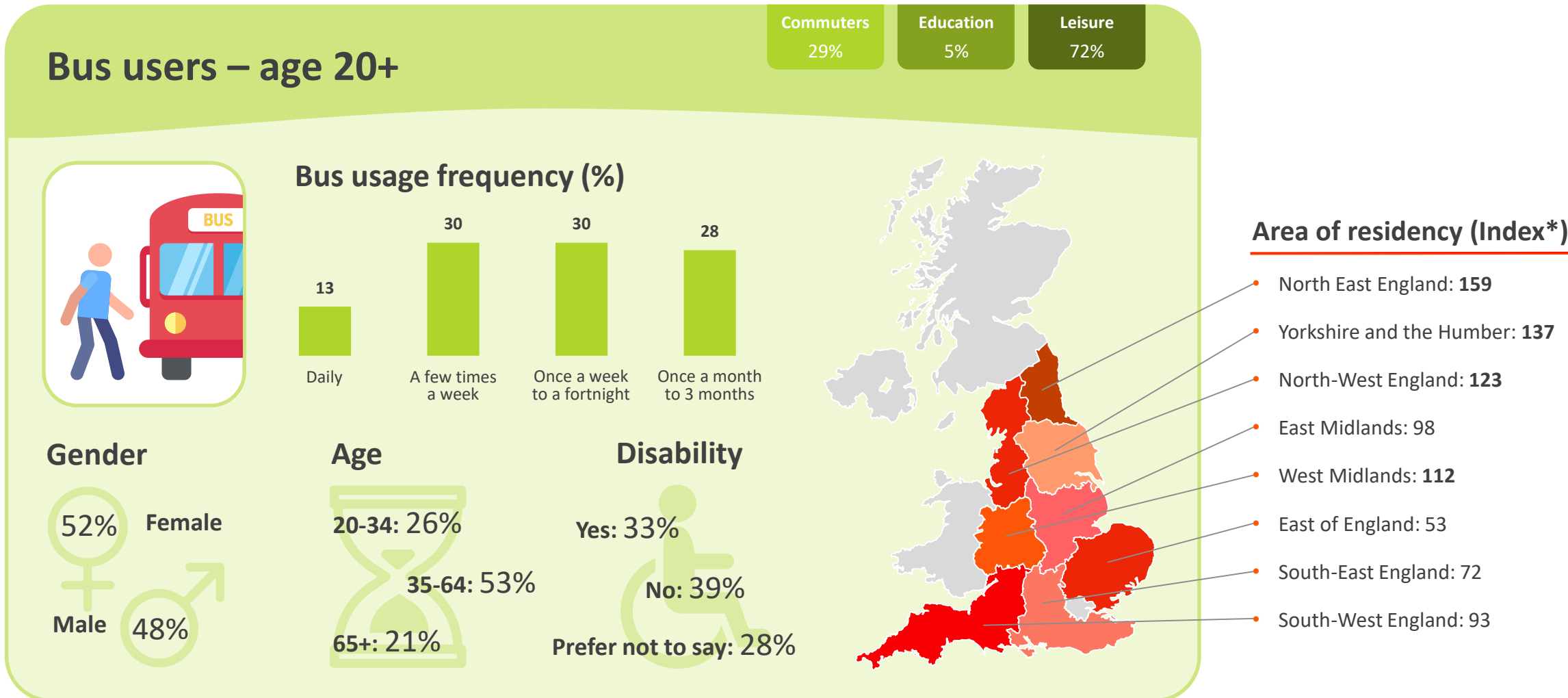
| By gender (%) | | Net – At least reasonable extent |
|---|---------|----------------------------------|
| Male | 36 / 24 | 61 |
| Female | 37 / 18 | 54 |
| By age (%) | | |
| 25-34 | 36 / 15 | 51 |
| 35-64 | 35 / 22 | 57 |
| 65+ | 40 / 25 | 65 |
| By car journeys that could be made by bus (%) | | |
| None of them | 38 / 24 | 62 |
| A few of them | 42 / 20 | 62 |
| About half | 38 / 18 | 56 |
| Most of them | 29 / 18 | 47 |
| All of them | 25 / 26 | 52 |

Q15. To what extent do you think buses can play a part in reducing air pollution?
 Base: All respondents 20+ years old: 5,000 / Male: 2,390 / Female: 2,610 / 20-34: 1,320 / 35-64:2,643 / 65+: 1,037
 None of them: 463 / A few of them: 1,096 / About half: 621 / Most of them: 603 / All of them:295
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Profile of bus users

Most bus users are around once a week

They primarily use the bus for leisure purposes



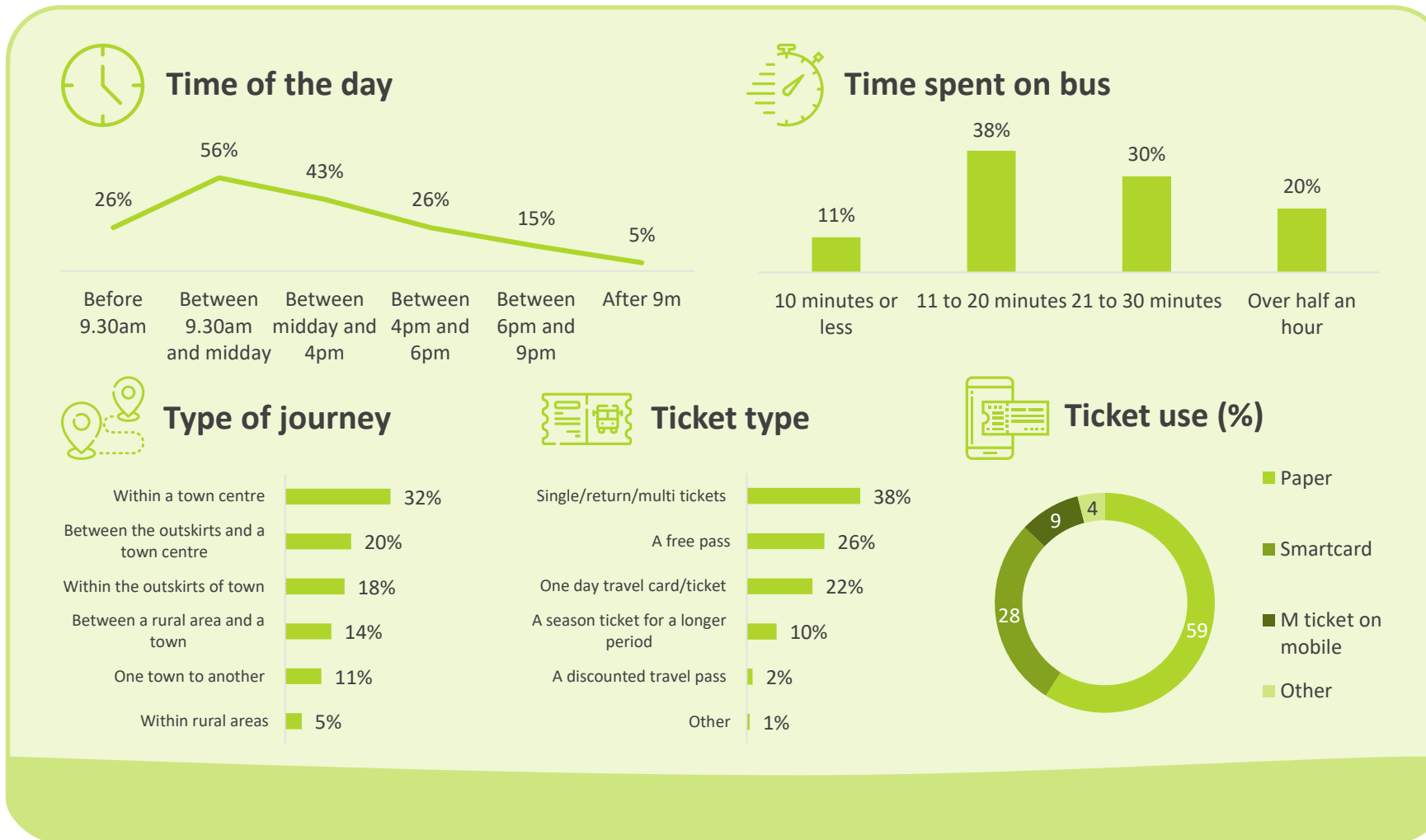
Q1. Are you male or female? / Q2. In which age group are you? / Q3. In which region do you live in? / Q4. How often do you typically travel by bus?
 Q17. For which type of journey do you mainly use the bus? / Q29. Are you affected by any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?
 Base: Bus users (20+); 5,000
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* Indexed on population estimate of England in 2018 by region - Statisat.com



Most bus users take the bus in the morning (before noon)

and for journeys of less than 30 min



Q17 For which type of journey do you mainly use the bus? / Q18. When you use the bus are the journeys... / Q19. Typically how long is the part on the bus?

Q22. And at what times of day do you travel by bus? / Q21. Form of ticket used.

Base: Bus users (20+): 5,000

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About BVA BDRC

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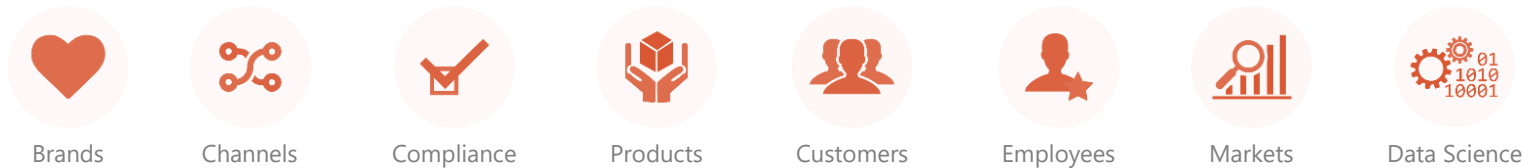
Who we are - BVA BDRC

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We joined the BVA Group in mid 2018. We have already seen significant benefits from joining a larger group, with fresh collaboration in emerging areas such as behavioural economics and Nudge theory, entry into new markets and a more extensive international network. The wider BVA Group has close to 1,000 staff across twenty offices in eleven countries, with a worldwide turnover of €185m.



Business challenges:



Quality / accreditation (ISO, etc)



BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements