



Bus Passenger Priorities

Publish August 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 circa 100 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

transportfocus 

 **BVRC-**

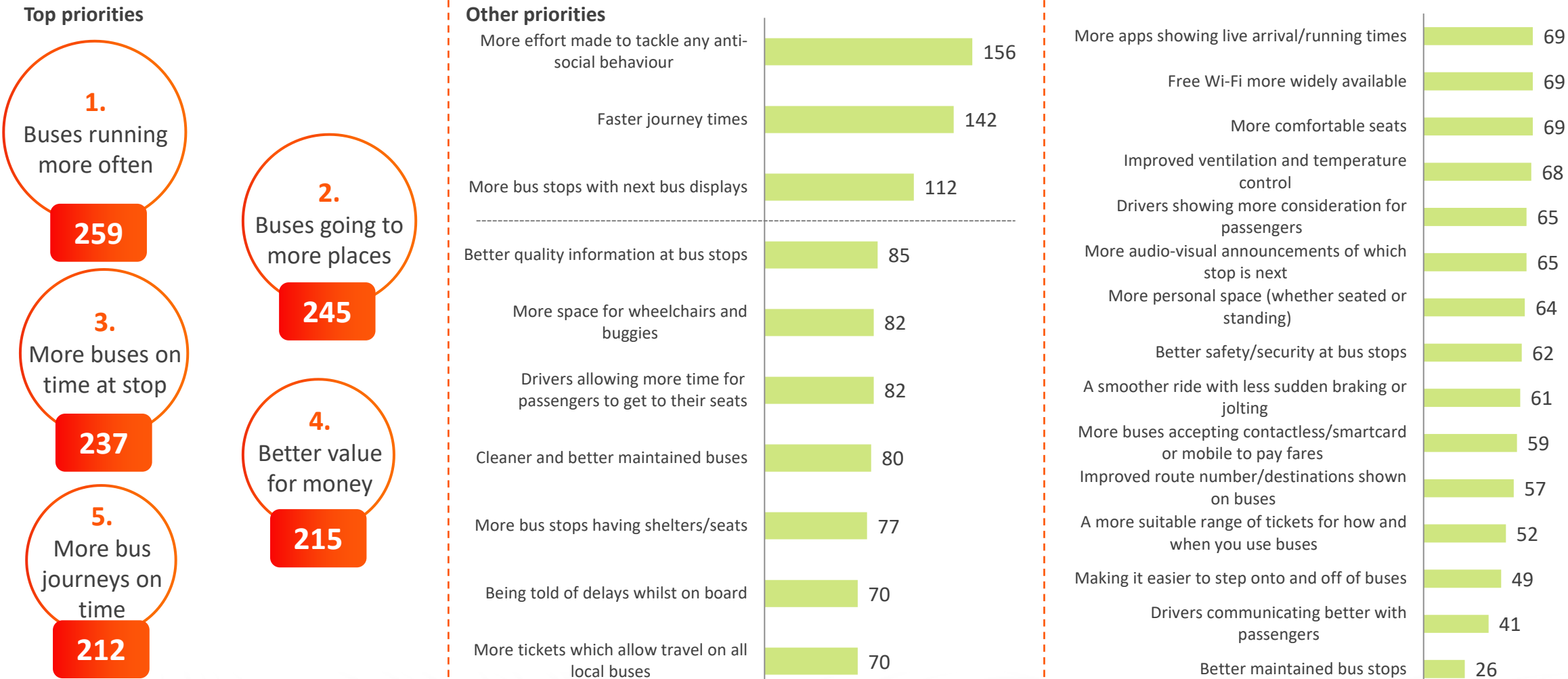
Key findings: bus users

- 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

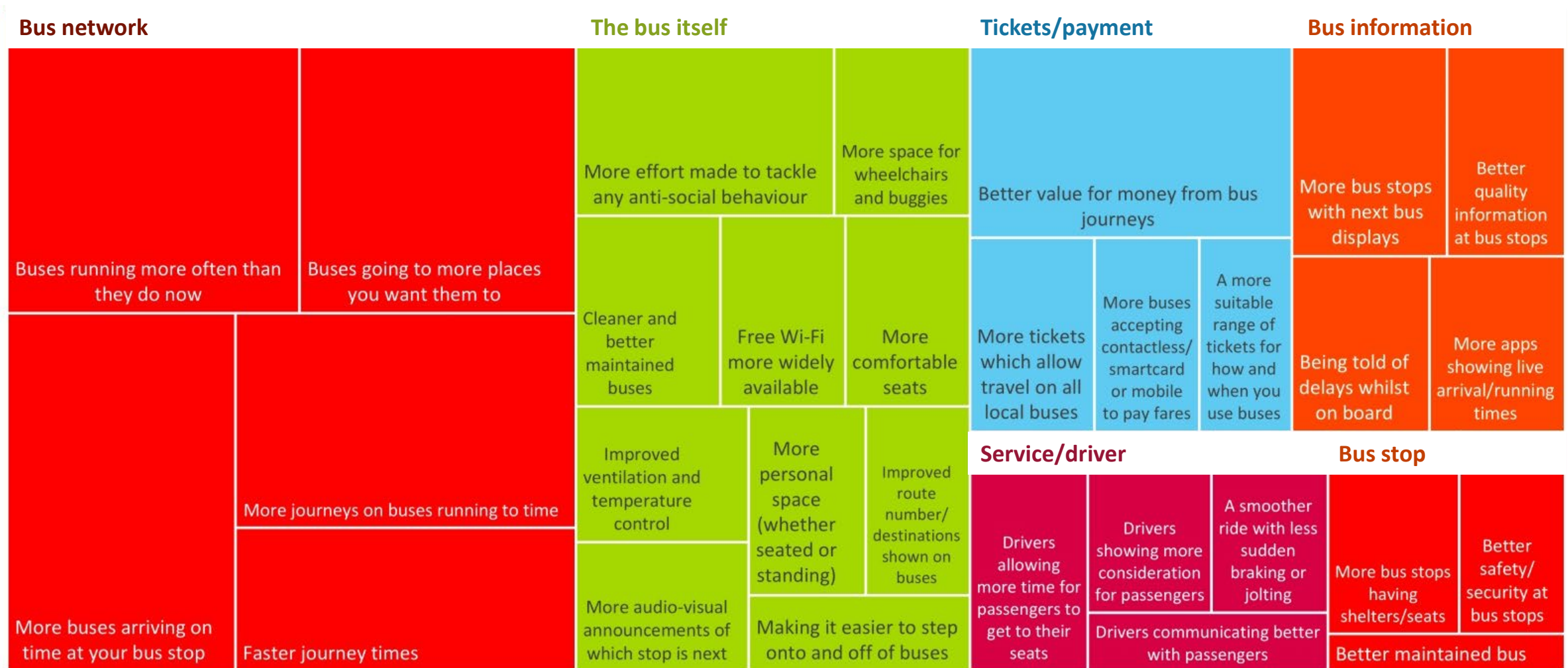
Although the cost of taking the bus is one of the strongest pain points, it is only the 4th priority



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
Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

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

Priorities for improvement: users



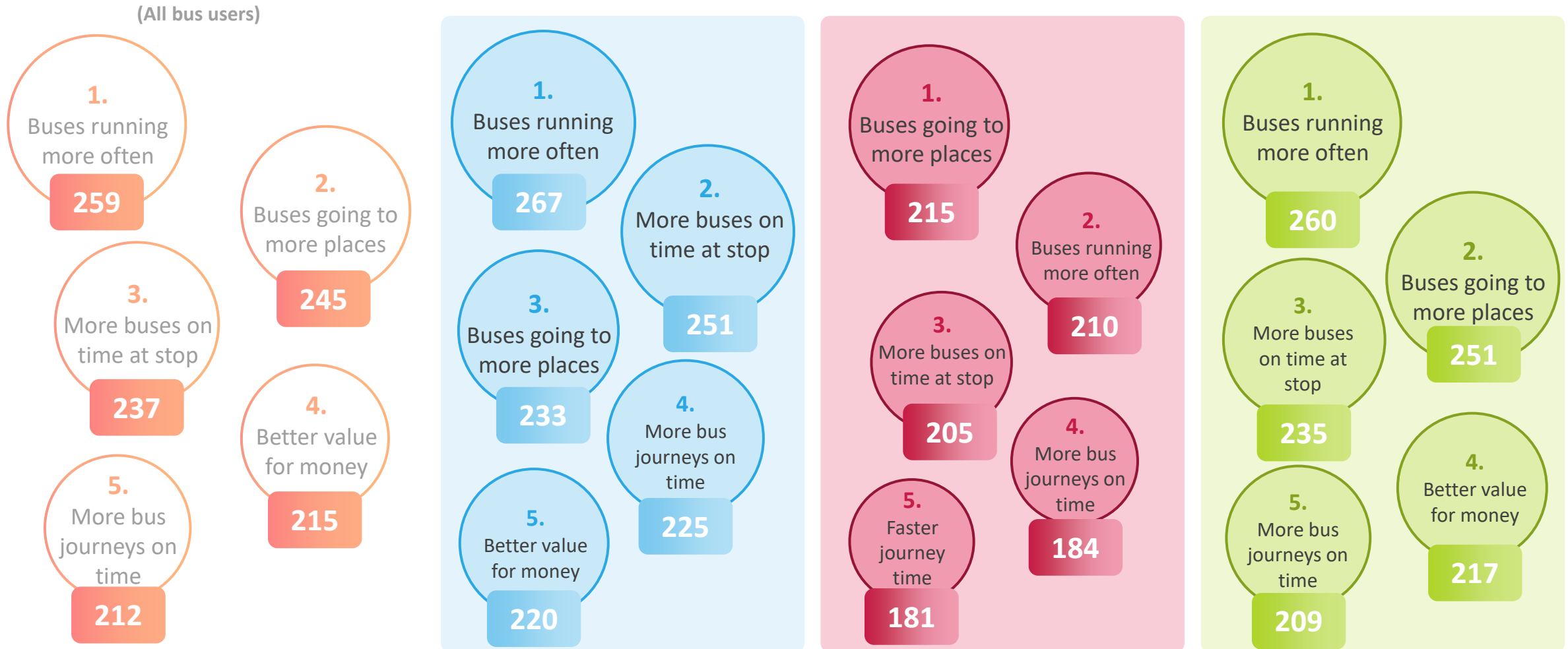
Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important

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

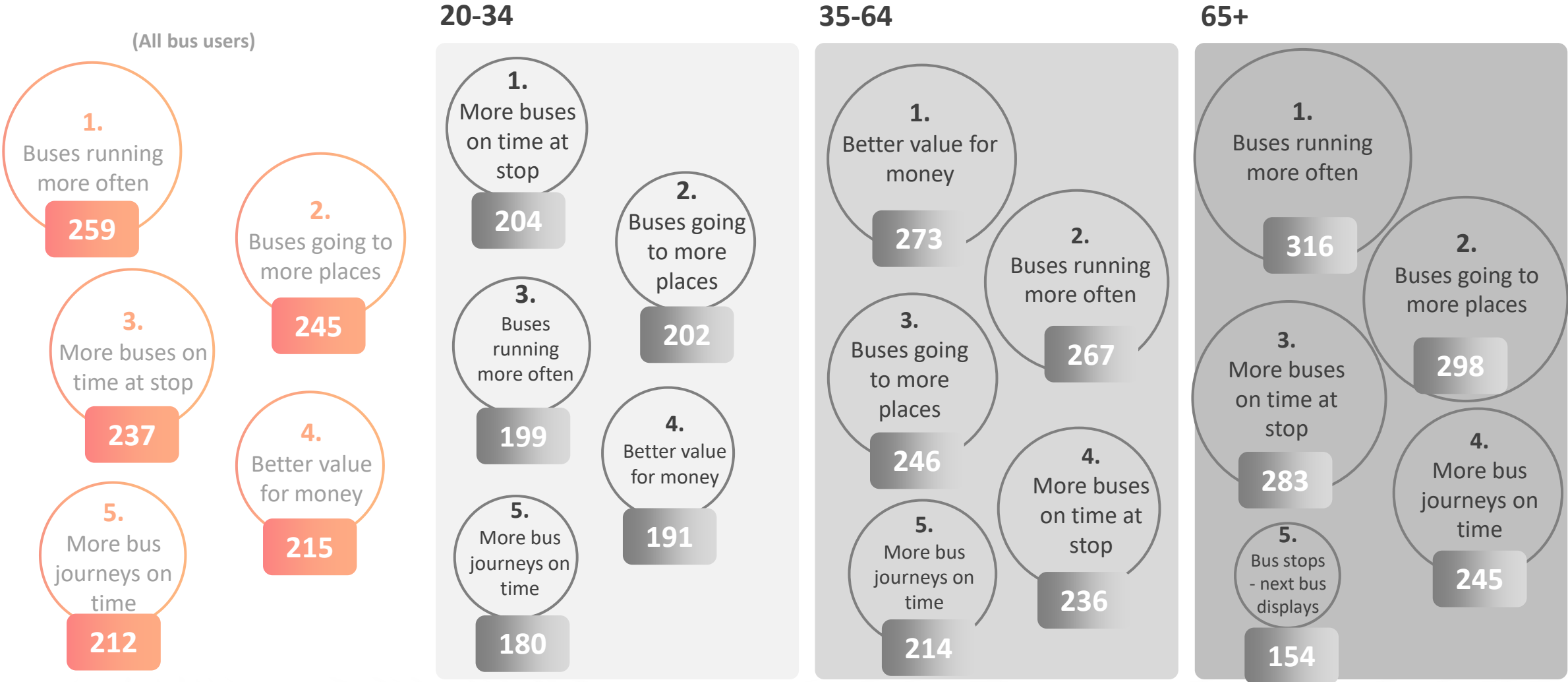


Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important

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

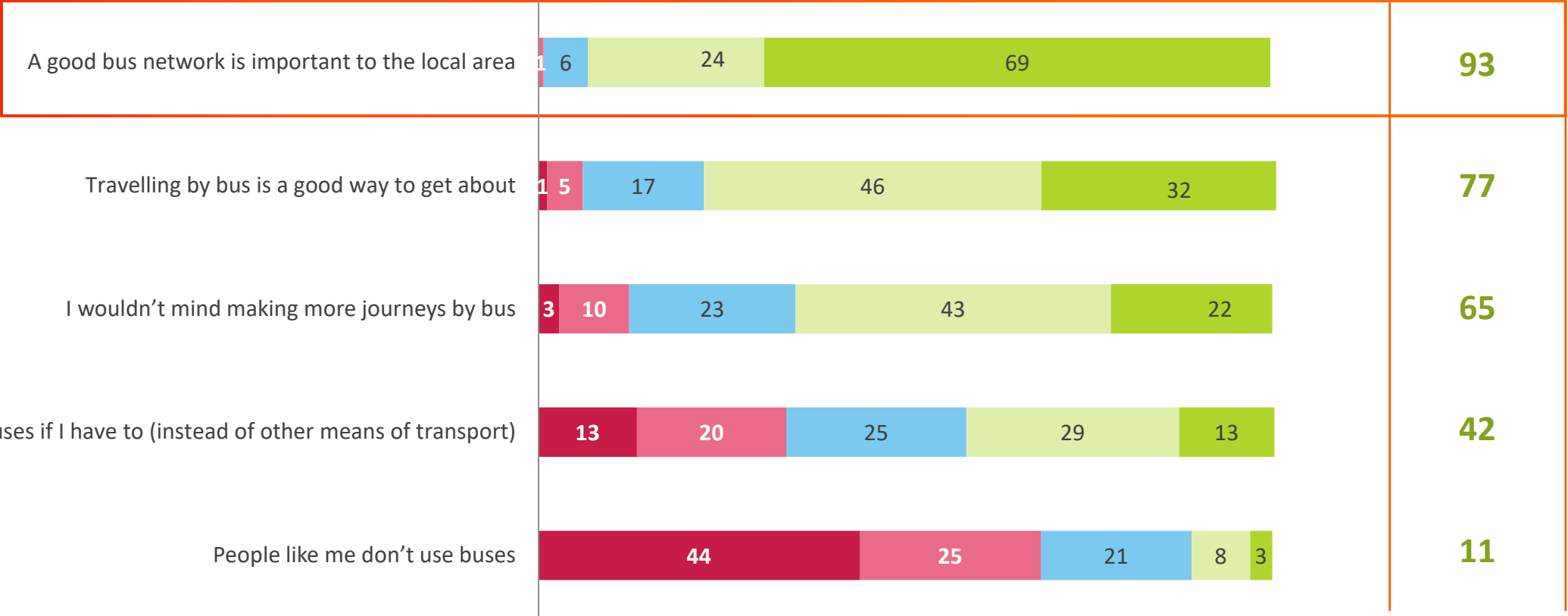


Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
Base: All bus users (20+): 5,000 / 20-34: 1,230 / 35-64: 2,643 / 65+: 1,037
Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

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

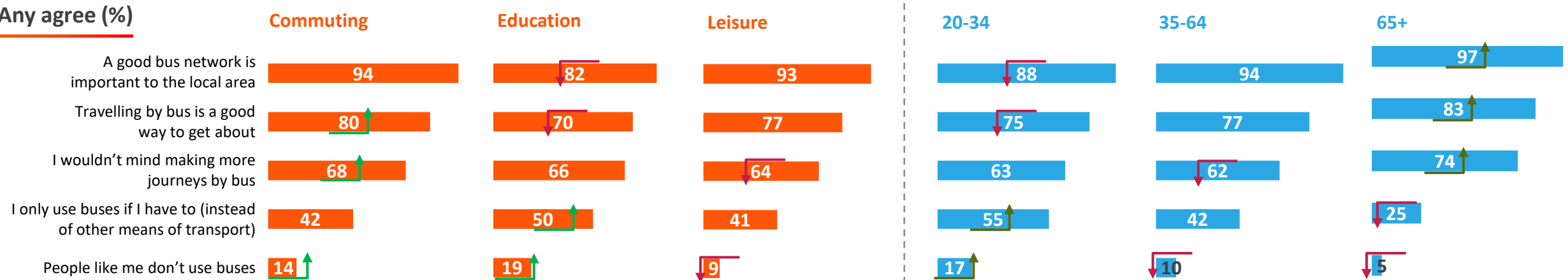


Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree

Q10. To what extent to 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



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

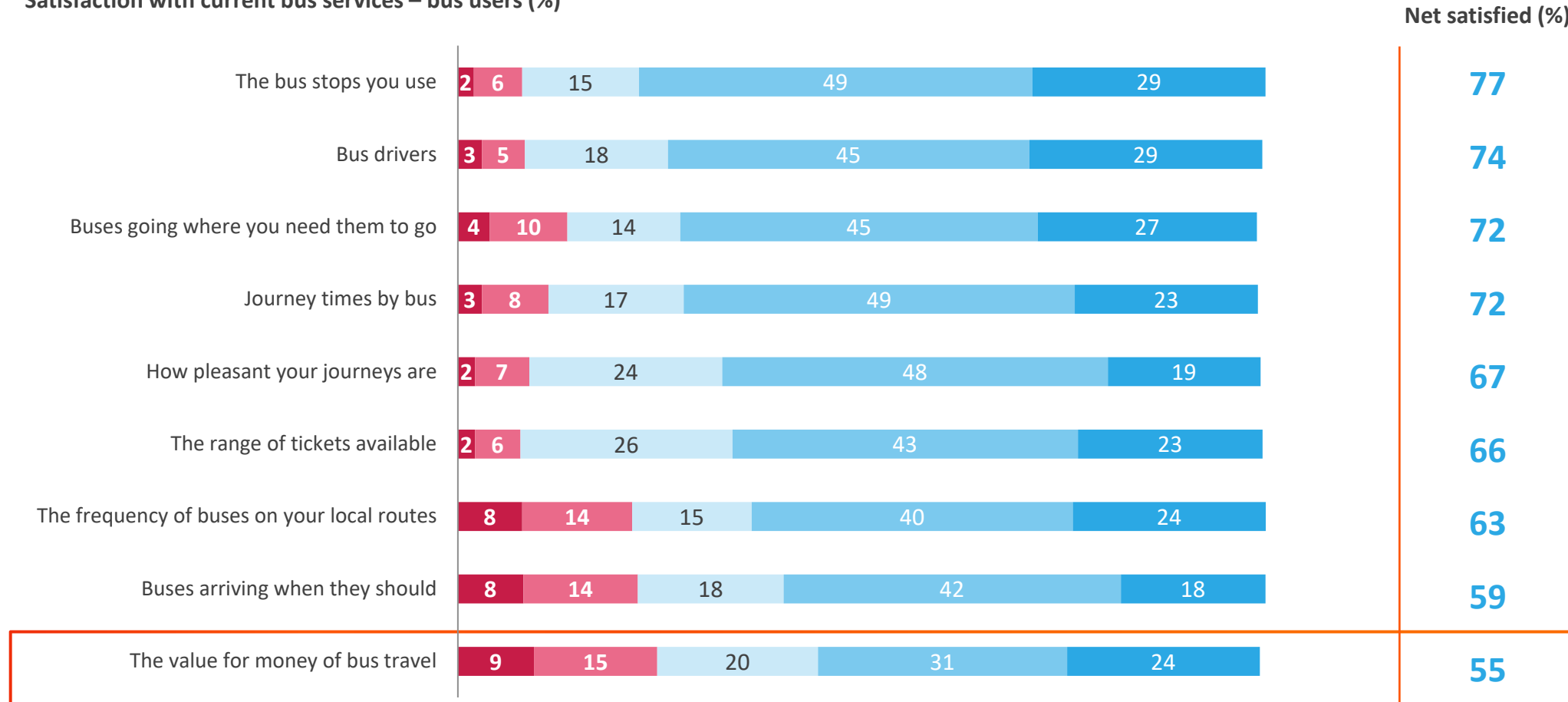
Significant difference to bus users

Lower Higher



Value for money is the strongest pain point

Satisfaction with current bus services – bus users (%)



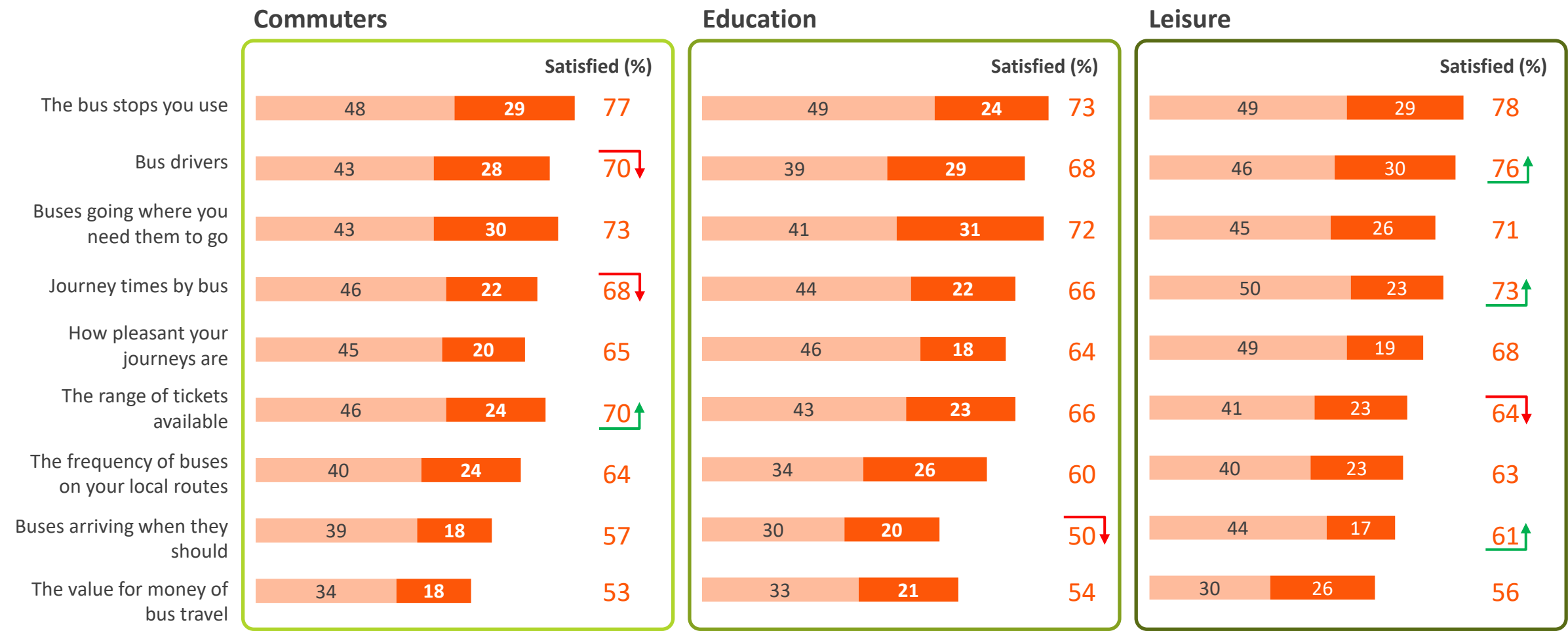
■ Very dissatisfied
 ■ Fairly dissatisfied
 ■ Neither satisfied/dissatisfied
 ■ Fairly satisfied
 ■ Very satisfied

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

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

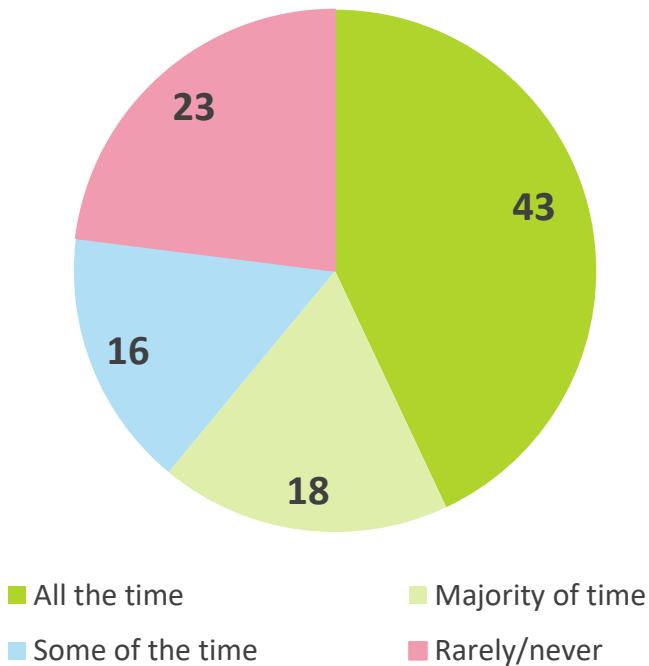
Lower Higher

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

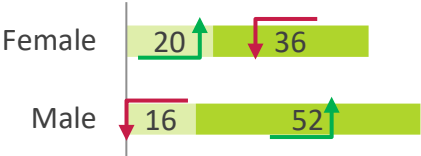
Opportunities to increase usage - users

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

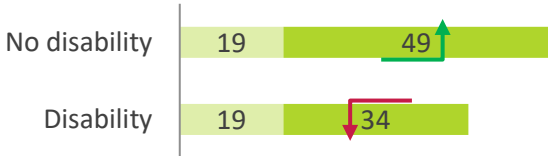
Bus user car access (%)



Car access by gender (%)



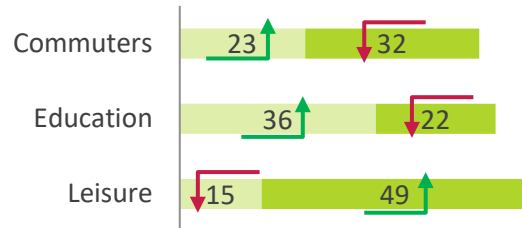
Car access by disability (%)



Car access by age (%)



Car access y passenger type (%)



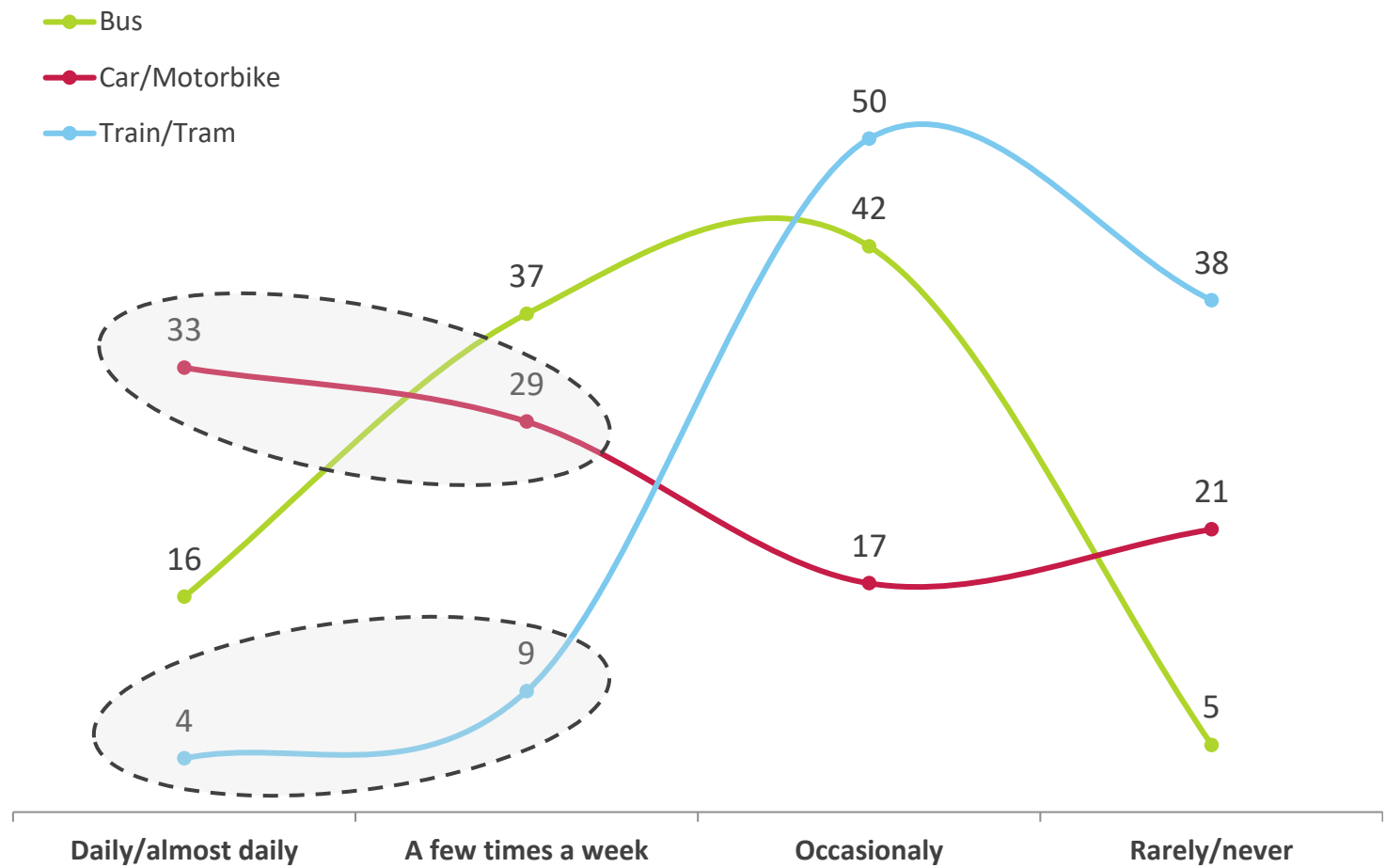
Q27. How often is a car/motorbike available to you
Base: All respondents 20+ years old: 5,000 / Male: 2,390 / Female: 2,610 / 20-34: 1,320 / 35-64:2,643 / 65+: 1,037
Disability: 1,662 / No Disability: 1,949 / Commuters: 1,178 / Education: 247 / Leisure:3,575

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 - users



62%

of bus users make journeys by **car/motorbike** journeys at least a few times per week

13%

of bus users make journeys by **train/tram** journeys at least a few times per week

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

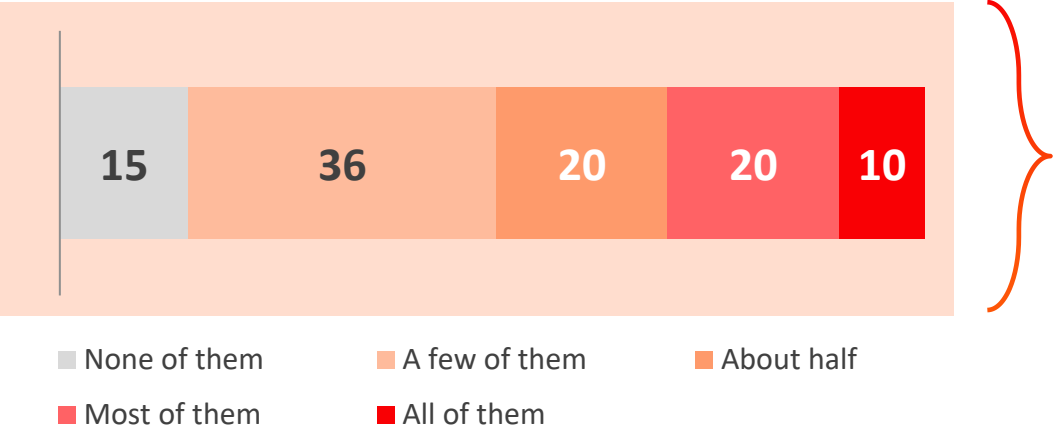
Of those 62% of users who also made car journeys often one third feel most/all could be made by bus

Opportunities to increase usage - users

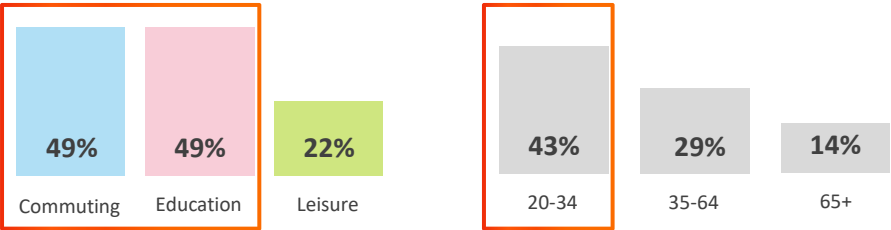
In other words, around a 5th of car journeys could well be made by bus

Higher among commuters and younger users

% that make car/motorbike journeys that could be made by bus



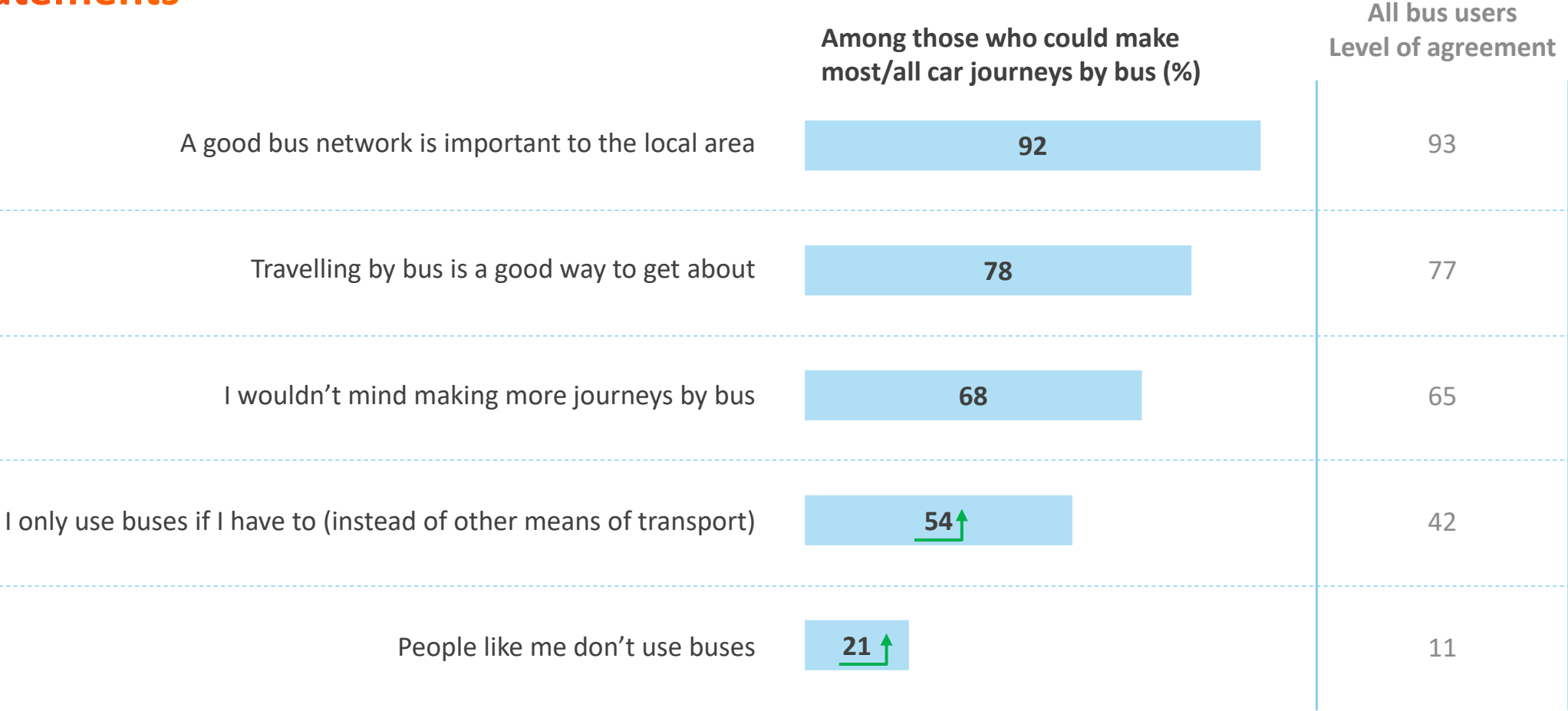
At least most of them



Q8. How many of your week's [Non bus] journeys could be made by bus?
Base: Car journeys: 3,078 / Train journeys: 650

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 - users



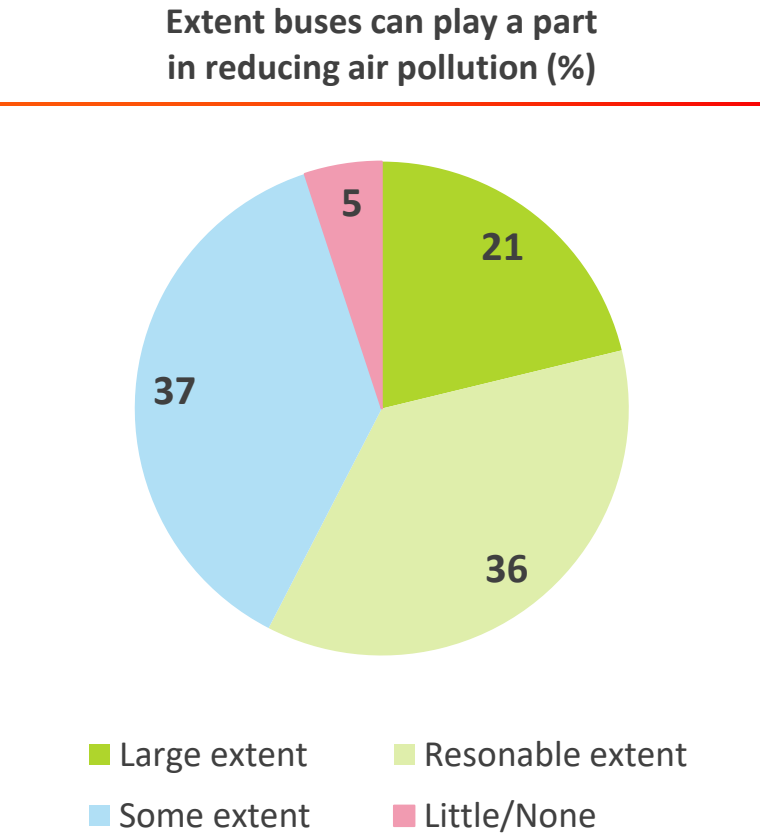
Significant difference to bus users

Lower Higher

Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
Base: Receptive users (20+): 898 All bus users (20+): 5,000

Half believe buses could play a part in reducing air pollution

Older and less frequent users identify more with that statement



Opportunities to increase usage - users

By gender (%)		Net – At least reasonable extent
Male	<div><div></div><div></div></div> <div>3624</div>	61
Female	<div><div></div><div></div></div> <div>3718</div>	54
By age (%)		
25-34	<div><div></div><div></div></div> <div>3615</div>	51
35-64	<div><div></div><div></div></div> <div>3522</div>	57
65+	<div><div></div><div></div></div> <div>4025</div>	65
By car journeys that could be made by bus (%)		
None of them	<div><div></div><div></div></div> <div>3824</div>	62
A few of them	<div><div></div><div></div></div> <div>4220</div>	62
About half	<div><div></div><div></div></div> <div>3818</div>	56
Most of them	<div><div></div><div></div></div> <div>2918</div>	47
All of them	<div><div></div><div></div></div> <div>2526</div>	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
Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

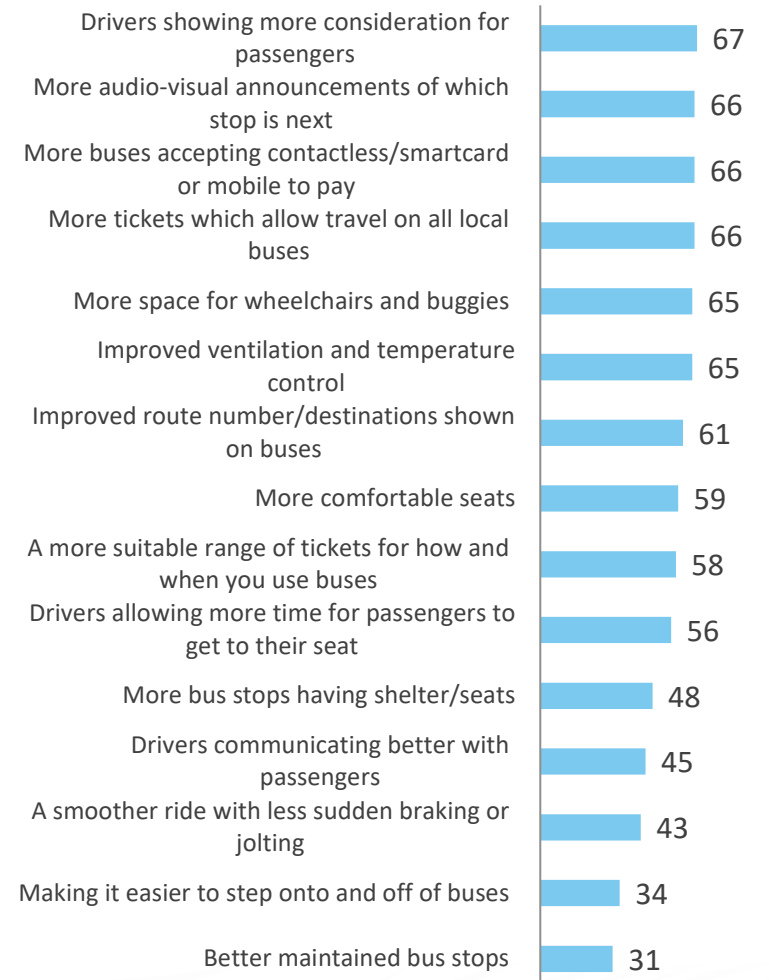
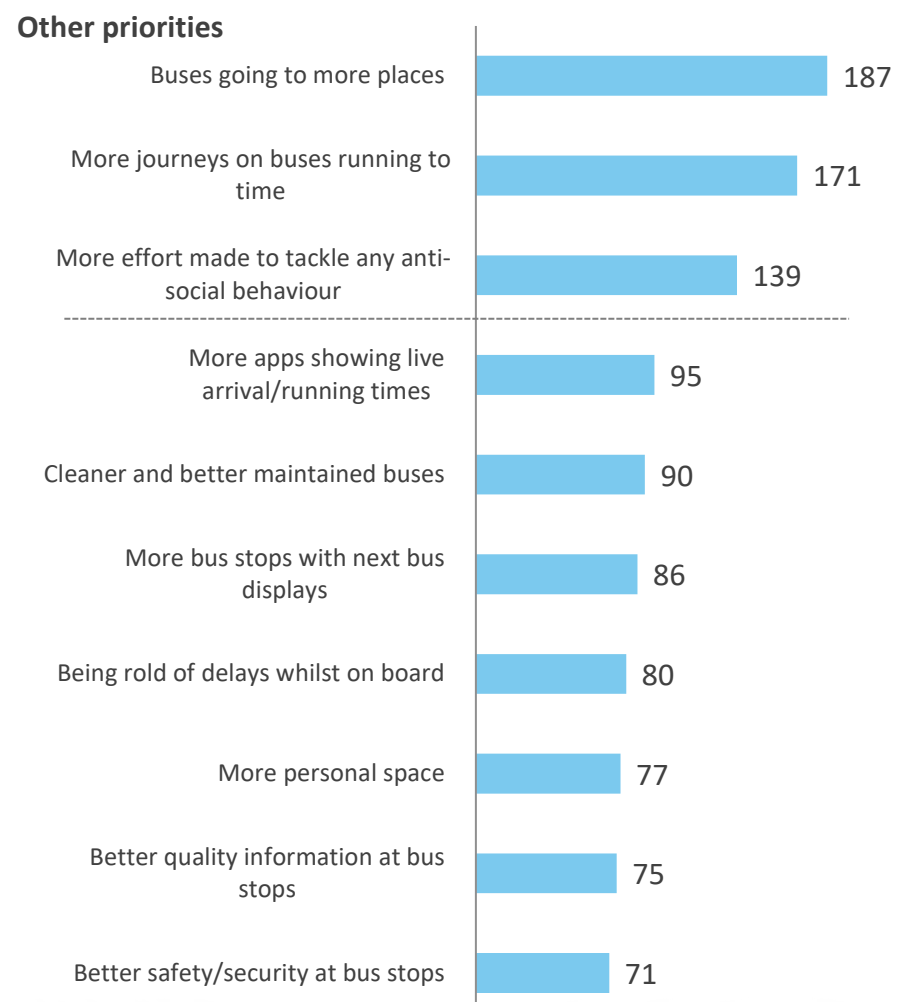
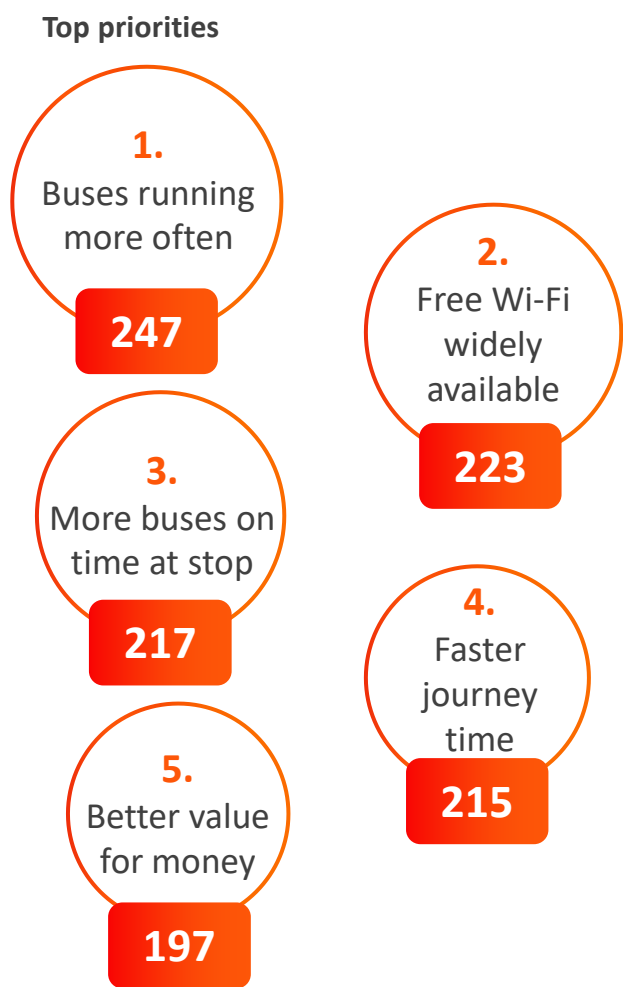
Youth bus users

Key findings: youth users

- Three of the top five priorities centre on the bus network: 'running more often'; faster journey times; and 'more on time at stop'. Free Wi-Fi was second priority. Value for money fifth priority.
- Their attitude towards bus is generally positive, but less so on the statement "I only use buses if I have to".
- Three fifths make regular journeys using the car of which around 4 in 10 of these users said 'all or most' could be made by bus.
- Around half of youth users felt buses could play a reasonable role in reducing air pollution.

Improving the bus network also the number 1 priority as 20+; but free Wi-Fi is 2nd and value for money just makes the top 5

Priorities for improvement – youth users

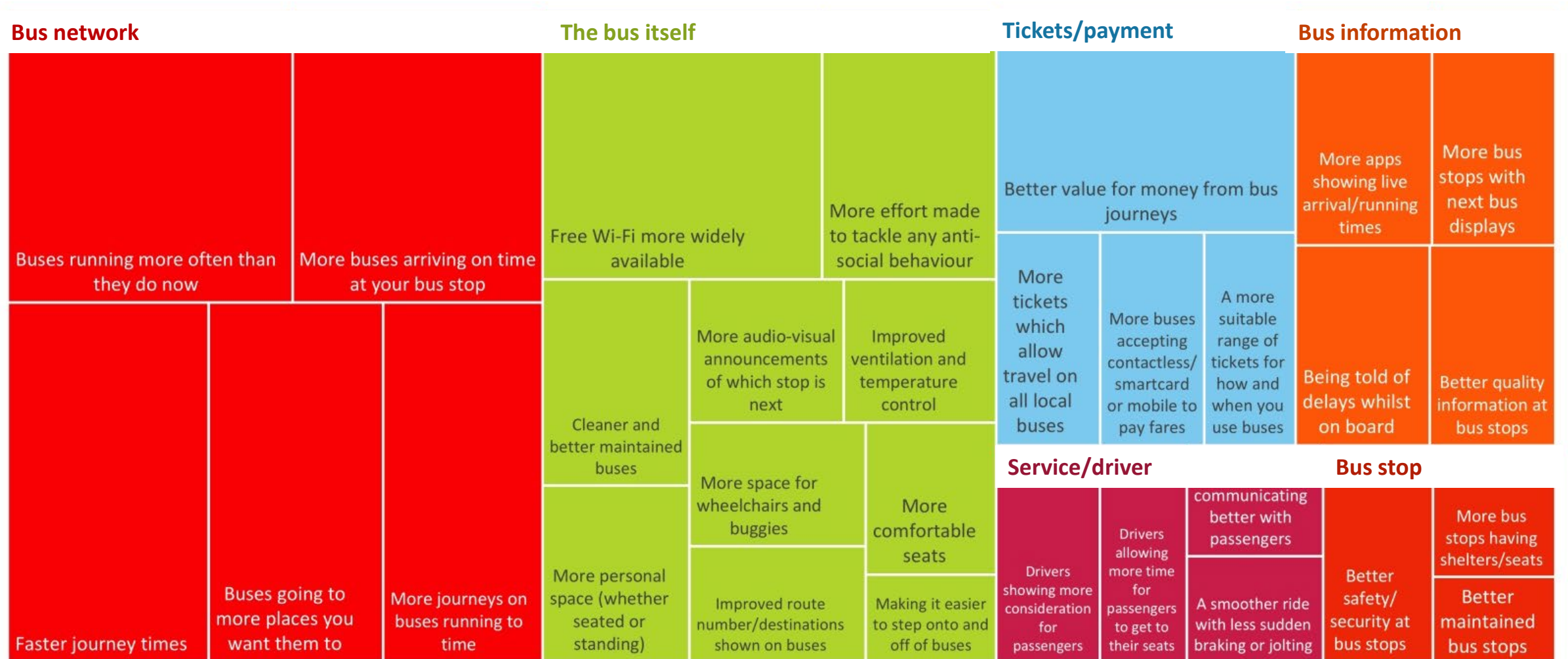


Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
Base: All youth bus users (14-19): 846



Attributed associated with improving the bus network highest share of priorities as per 20+

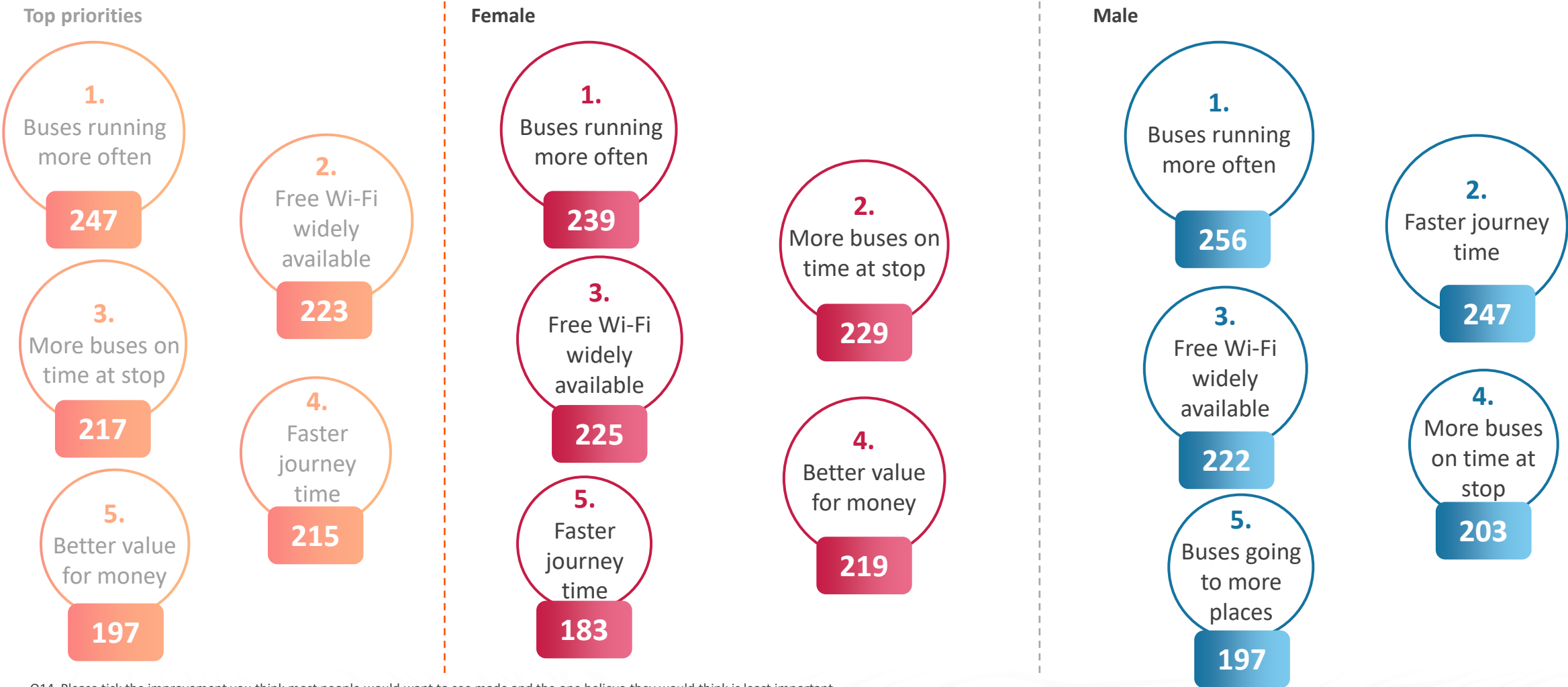
Priorities for improvement – youth users



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 youth bus users (14-19): 846

For male and female buses running more often matters most – but then it is punctuality for female and faster journey times for males

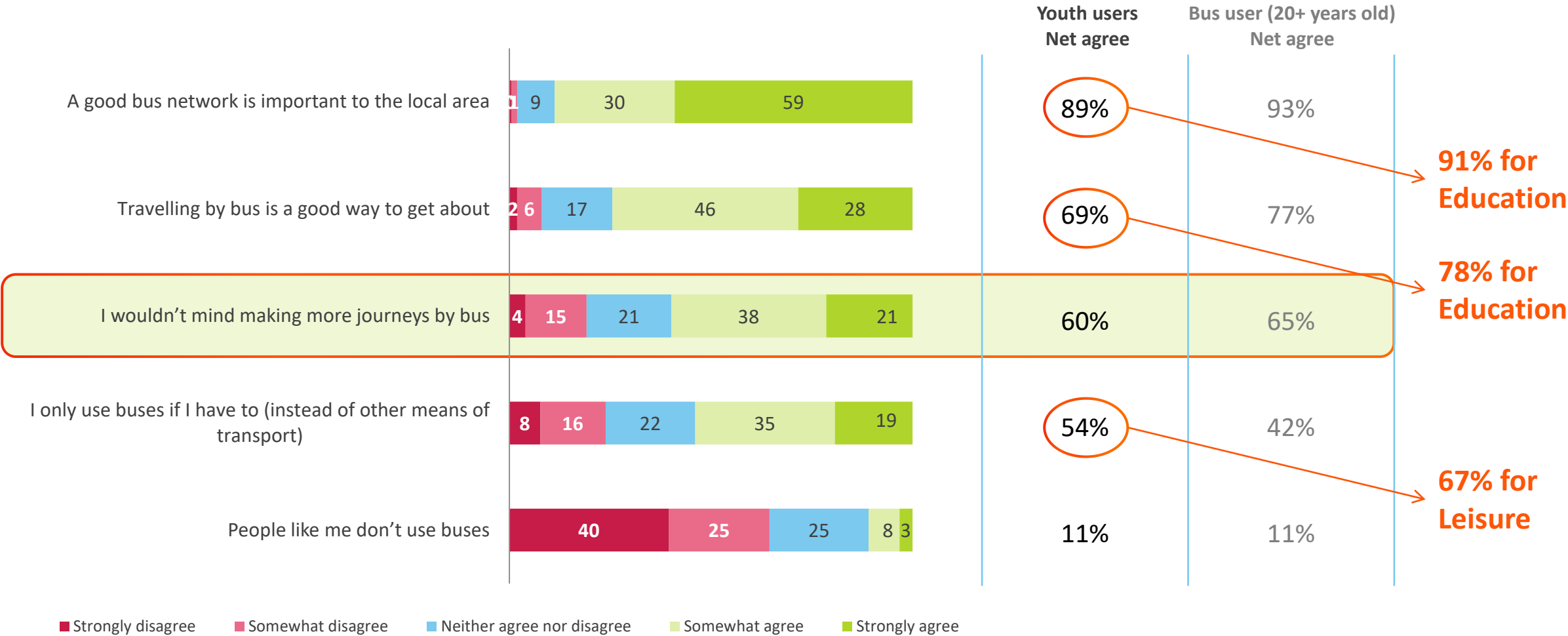
Priorities for improvement – youth users



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 youth bus users (14-19): 846

Attitude to buses – youth users similar to main bus users, but a fraction more negative.

Attitude to buses – youth users

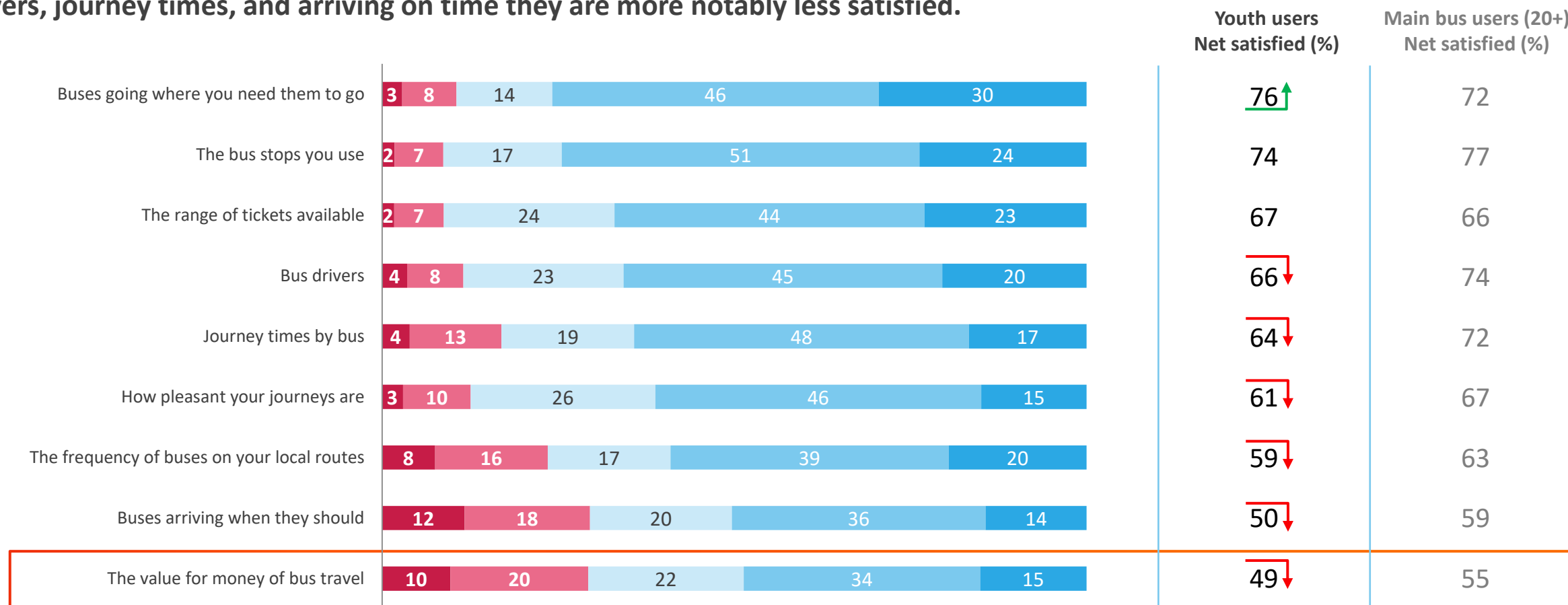


Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
Base: All youth bus users : 846 / All bus users (20+): 5,000

Value for money is an even stronger pain point for youth users

Buses going where needed youth users are the most satisfied about; but bus drivers, journey times, and arriving on time they are more notably less satisfied.

Satisfaction – youth 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 : 4,990 / Youth bus users: 761

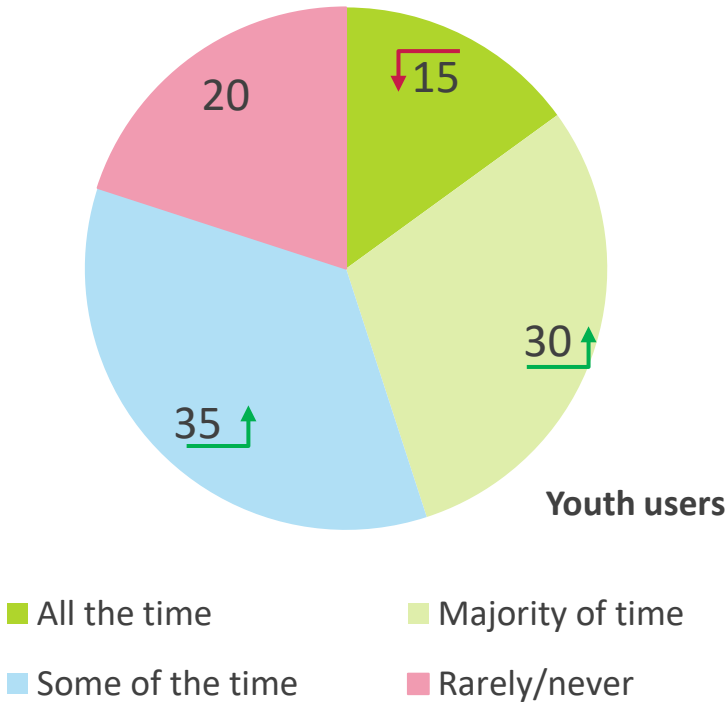
Significant difference to bus users (20+)

↓ Lower
 ↑ Higher

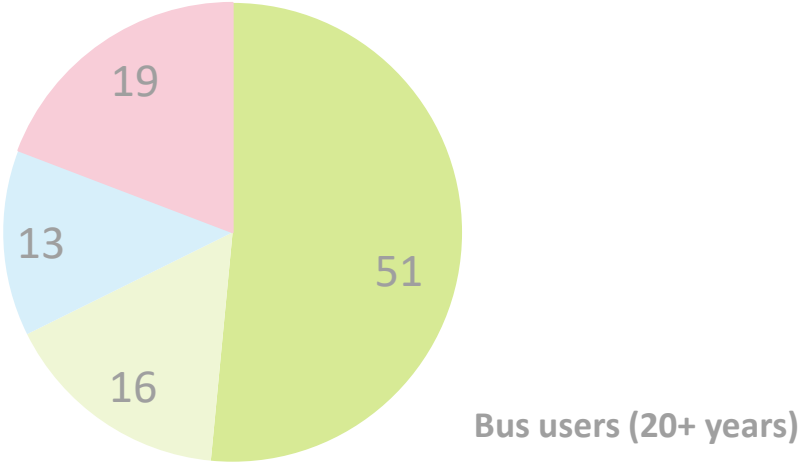
But compared to 20+ users, youth users have less option of taking the car

Opportunities to increase usage – youth users

Frequency of car availability (%)



Frequency of car availability (%)



Significant difference to bus users (20+)

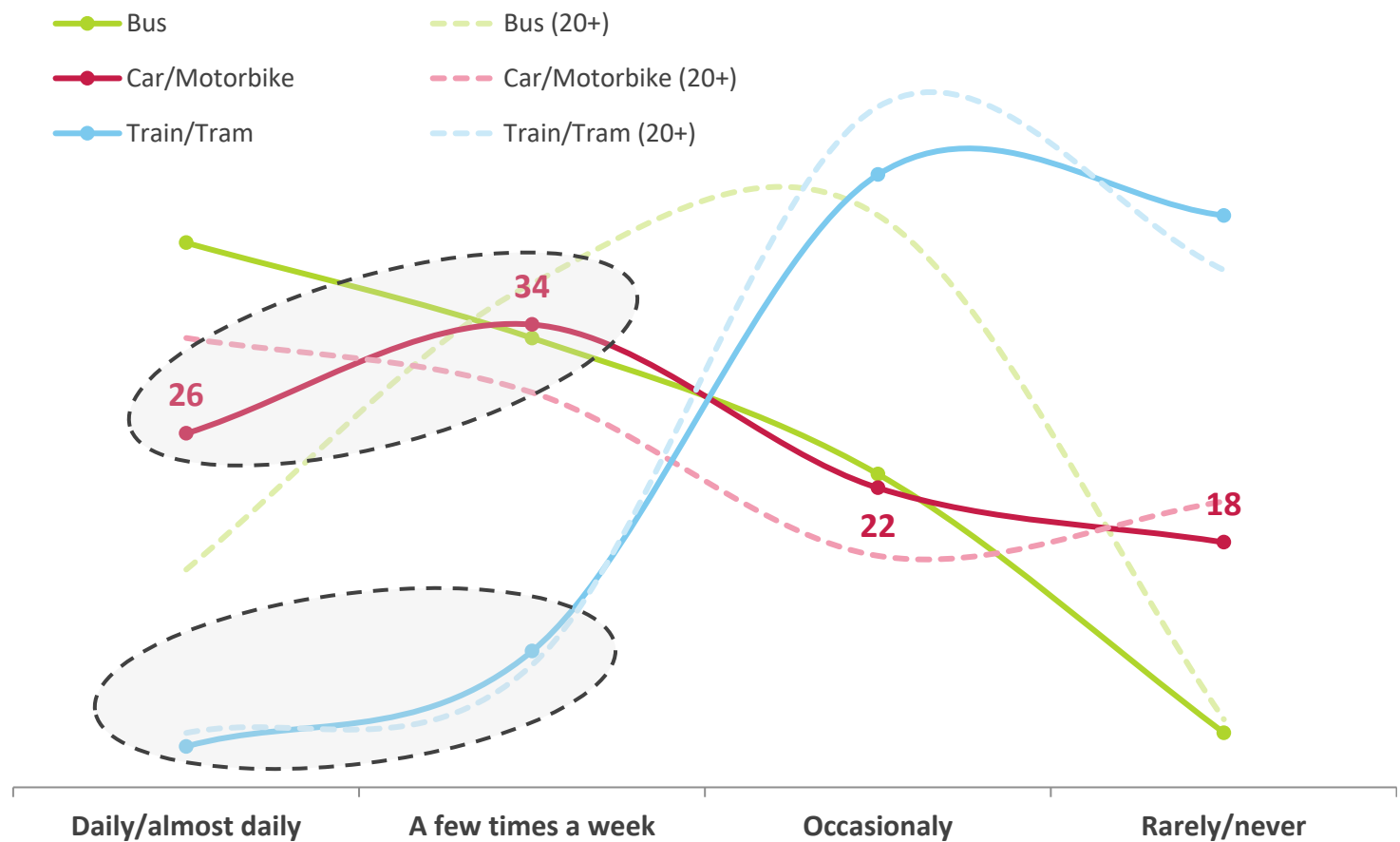
Lower Higher

Q27. How often is a car/motorbike available to you?
Base: All respondents 20+ years old: 5,000 / Youth bus users: 846

Frequency of bus usage is greater than 20+ users.

Opportunities to increase usage – youth users

But equally around 3/5th make journeys by car at least a few times a week



60%

of bus users make journeys by **car/motorbike** journeys at least a few times per week

13%

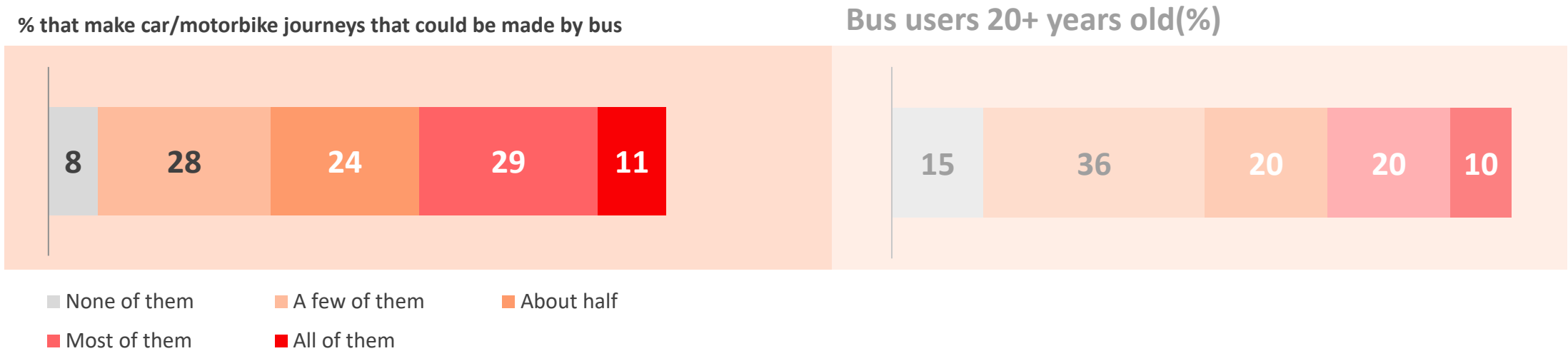
of bus users make journeys by **train/tram** journeys at least a few times per week

Q7. In a typical week how frequently do you use the following modes of transport?
Base: All youth bus users : 846

A higher proportion of youth car users could make more journeys by bus than 20+ years

Opportunities to increase usage – youth users

40% could make most of their car journeys by bus



Q8. How many of your week's [Non bus] journeys could be made by bus?
Base: Overall/Youth bus users: Car journeys: 3,078/509 / Train journeys: 650/112

Of those users who can make their car journeys by bus (the 2/5 of the 60%); they do not really differ in attitude to youth users as a whole

Opportunities to increase usage – youth users

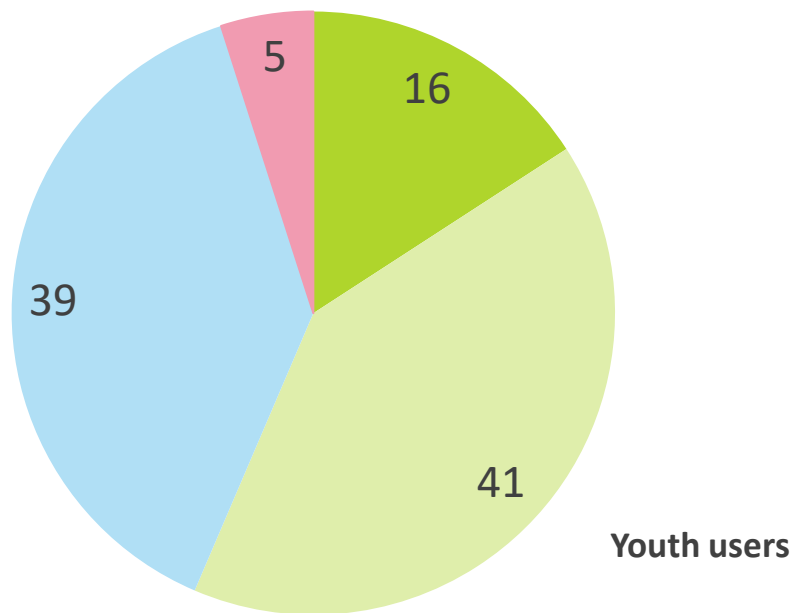
	Among those who could make most/all car journeys by bus (%)	All youth bus users Level of agreement
A good bus network is important to the local area	88	89
Travelling by bus is a good way to get about	74	69
I wouldn't mind making more journeys by bus	62	60
I only use buses if I have to (instead of other means of transport)	58	54
People like me don't use buses	16	11

Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
Base: Receptive youth users: 206, all youth users: 846

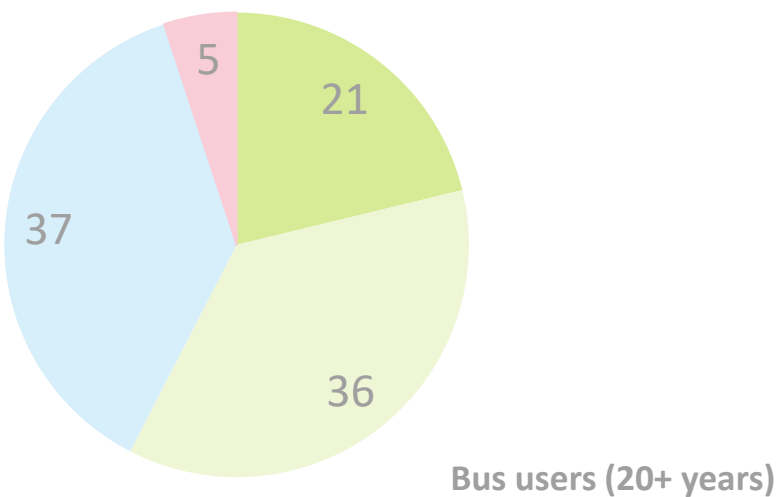
Just over half of youth users believe buses can play a role in reducing air pollution, similar to 20+ user segment

Opportunities to increase usage – youth users

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



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



■ Large extent ■ Resonable extent ■ Some extent ■ Little/None

Q15. To what extent do you think buses can play a part in reducing air pollution?
Base: All respondents 20+ years old: 5,000 / Youth bus users: 846



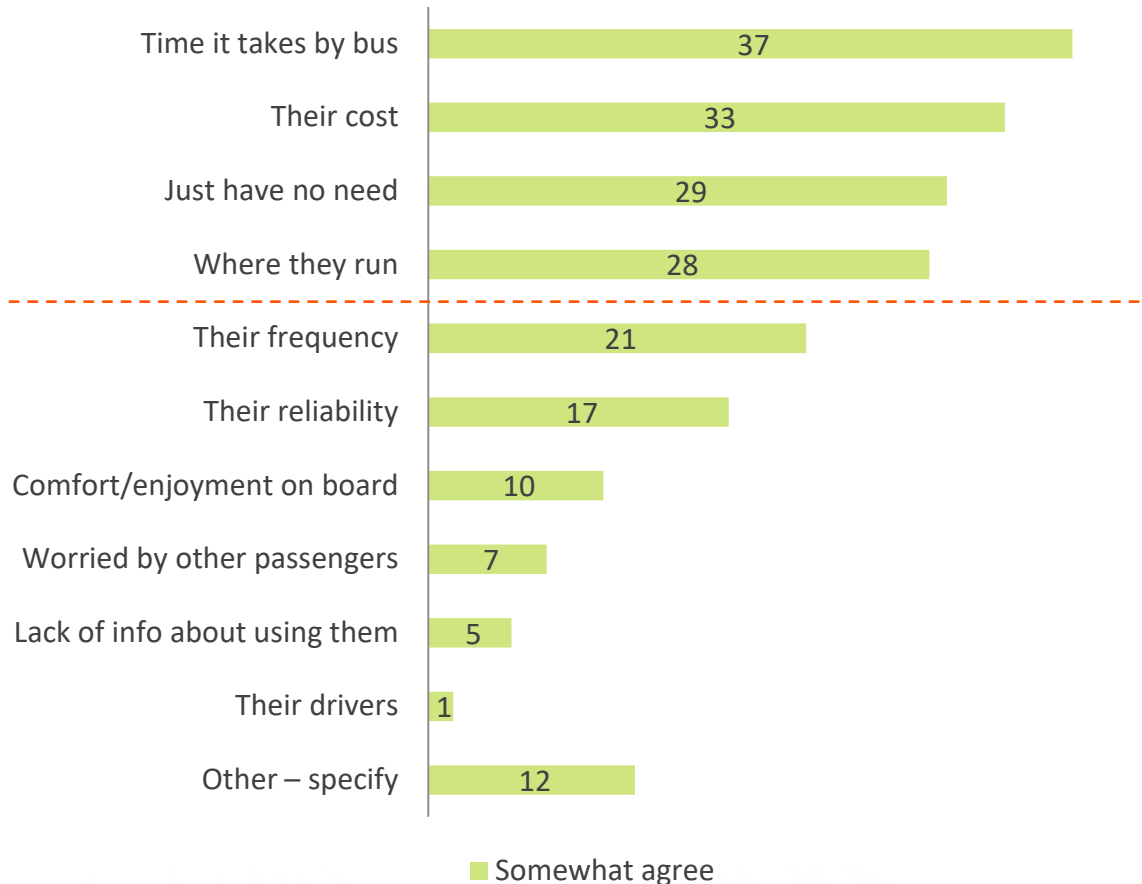
Non-users of bus

Key findings: non-users

- The substantial top of mind reasons they state for not using buses are: time taken by bus, their cost, where they run, and have no need.
- Their top five priorities include 'buses going to more places'; buses running more often; 'better value for money'; 'buses stop closer to home/destination' and 'buses running on time'.
- Their attitude towards using buses is more negative: around two fifths said 'travelling by bus is a good way to get about'; and only around a quarter agreed with 'I wouldn't mind making more journeys by bus'.
- Over four fifths are making car journeys each week, but just less than a fifth think those car journeys could be made by bus.

The bus takes too long (implies other modes are faster)

Also perceive buses doesn't run where they want to go, or frequently enough



For females the main issues are cost and the time the bus takes while for older non users it is about where the bus runs and frequency

Reasons for non use

	All non users Net agree	♂	♀	14-19	20-34	35-64	65+
Time it takes by bus	37	36	37	33	40	37	32
Their cost	33	25↓	38↑	39↑	38↑	37↑	13↓
Just have no need	29	32↑	27↓	41↑	32↑	25	28
Where they run	28	35↑	24↓	22	15↓	30	47↑
Their frequency	21	26↑	18↓	15	13↓	21	37↑
Their reliability	17	14↓	19↑	14	24↑	17↑	9↓
Comfort/enjoyment on board	10	9	11	11	13↑	9	6↓
Worried by other passengers	7	5	8	12↑	9↑	6	3↓
Lack of info about using them	5	4	5	7	6	4	4
Their drivers	1	1	2	2	2	2	0
Other – specify	12	12	11	6	7	12	21

Groups more open to increasing their bus usage

Significant difference to non-users

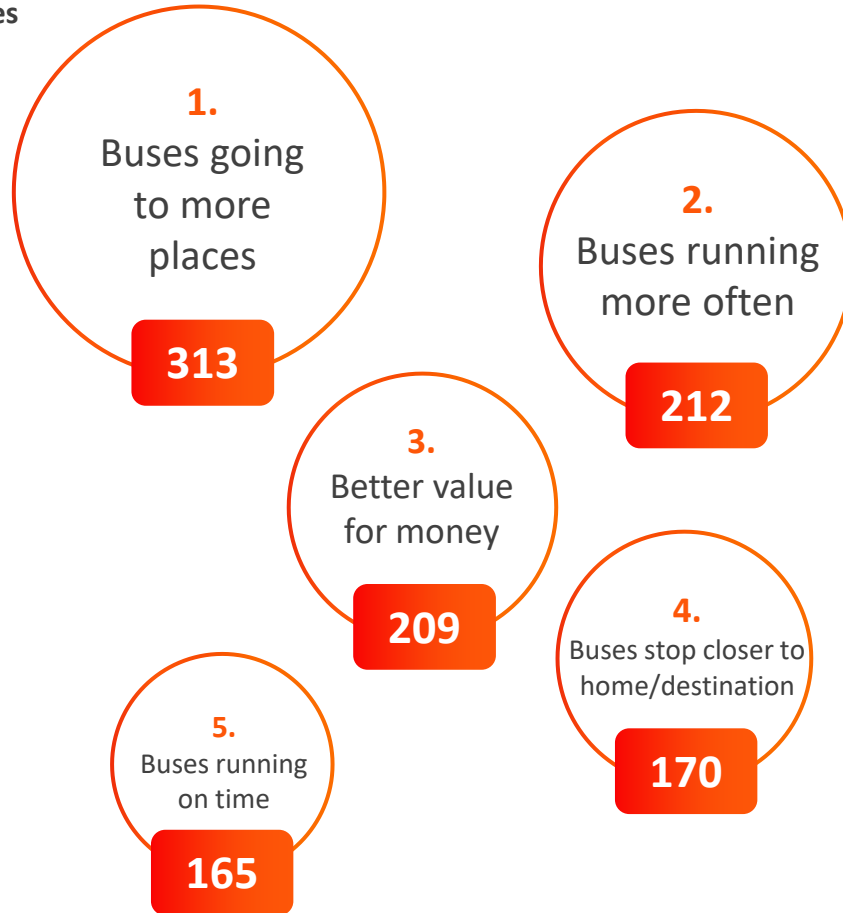
↓ Lower ↑ Higher

Q9. What are your top TWO reasons for not using buses

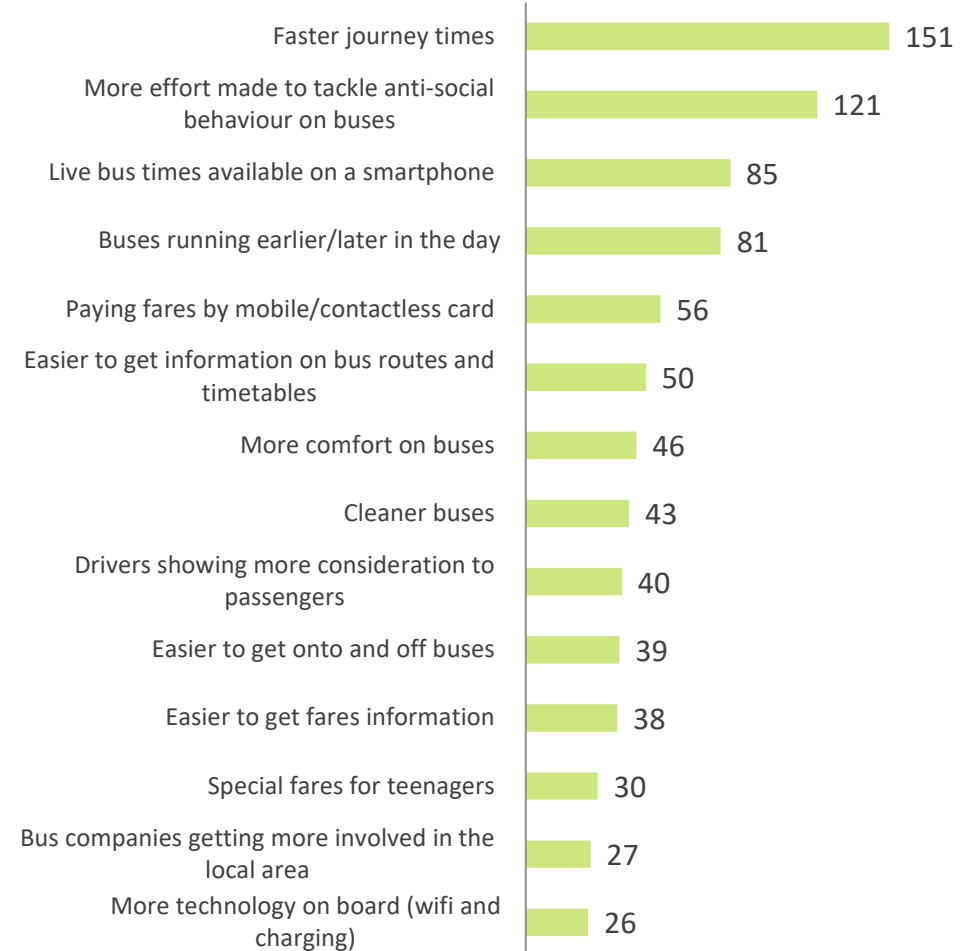
Centre on reasons for not using buses in the first place: more destinations, more often for a better price

Priorities for improvement – non users

Top priorities



Other priorities



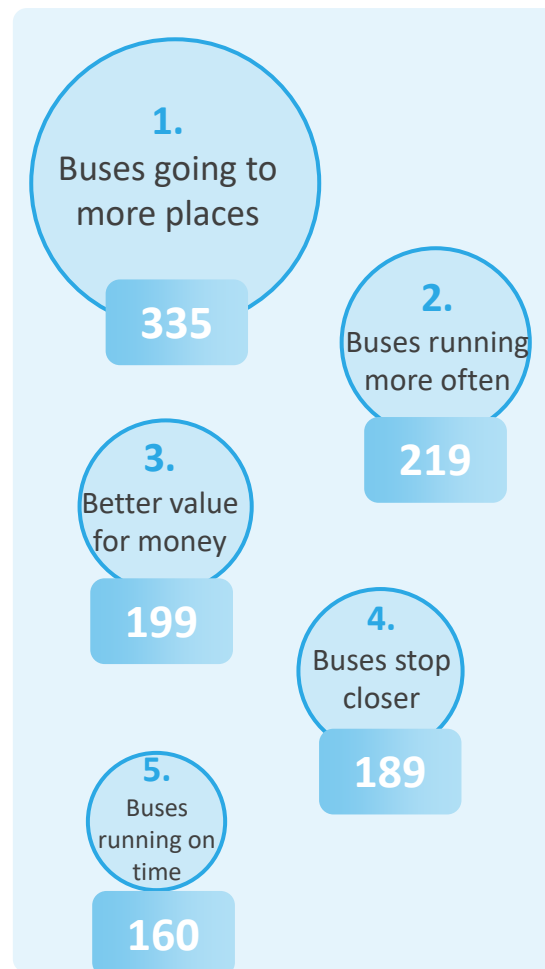
Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
Base: All non users: 1700

Men feel more strongly about having more destinations

Priorities for improvement – non users



Males



Females



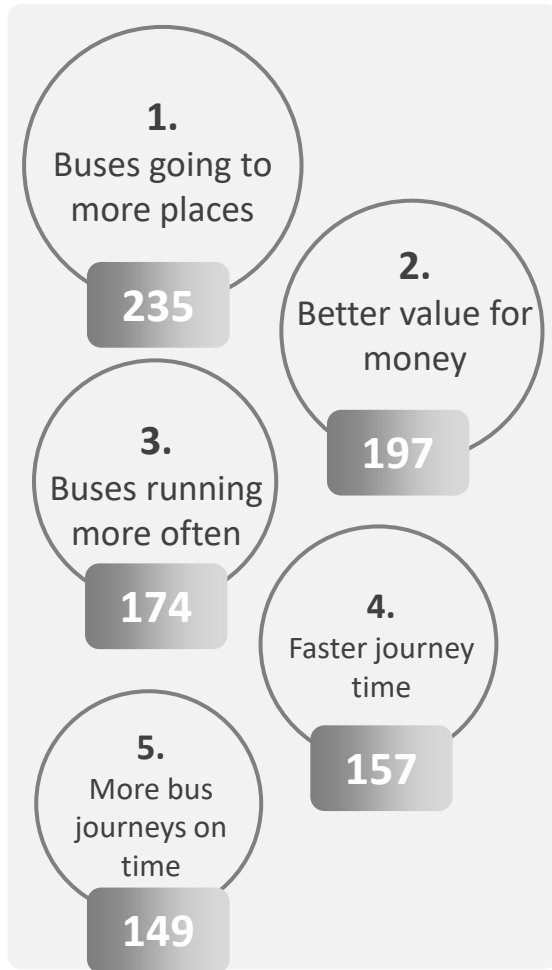
Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important
Base: All non users: 1700 / Male: 739 / Female: 961

Improvements – based on MaxDiff analysis

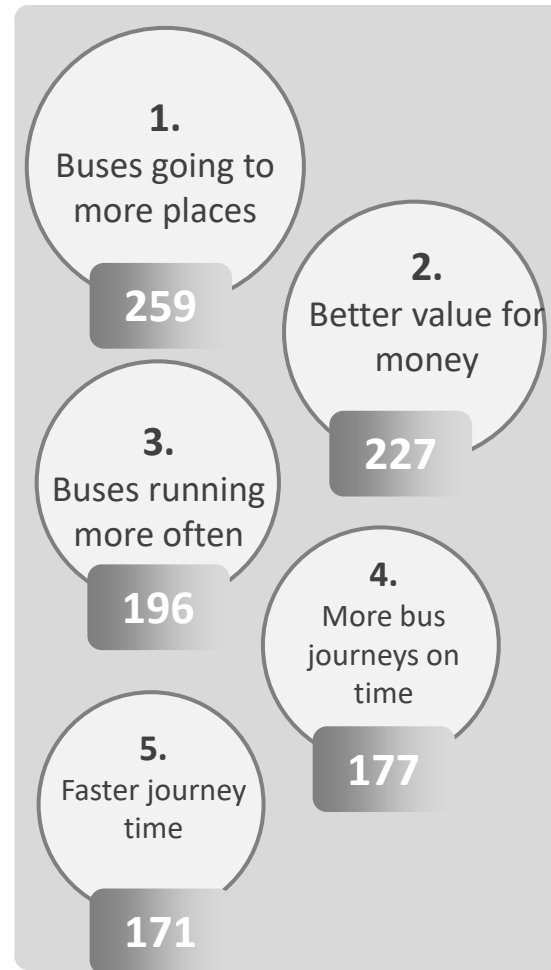
Eldest age group its about more bus routes; Younger groups VFM and faster journeys

Priorities for improvement – non users

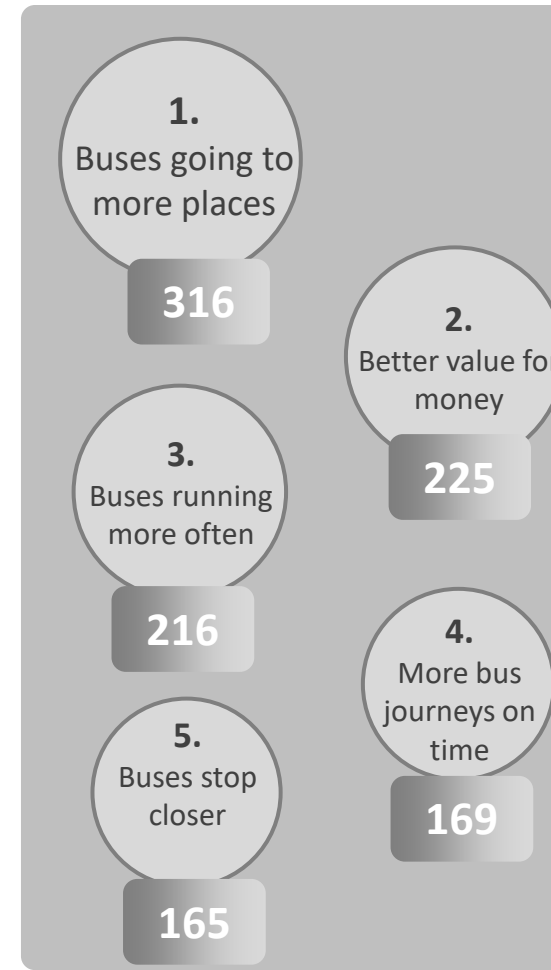
14-19 years



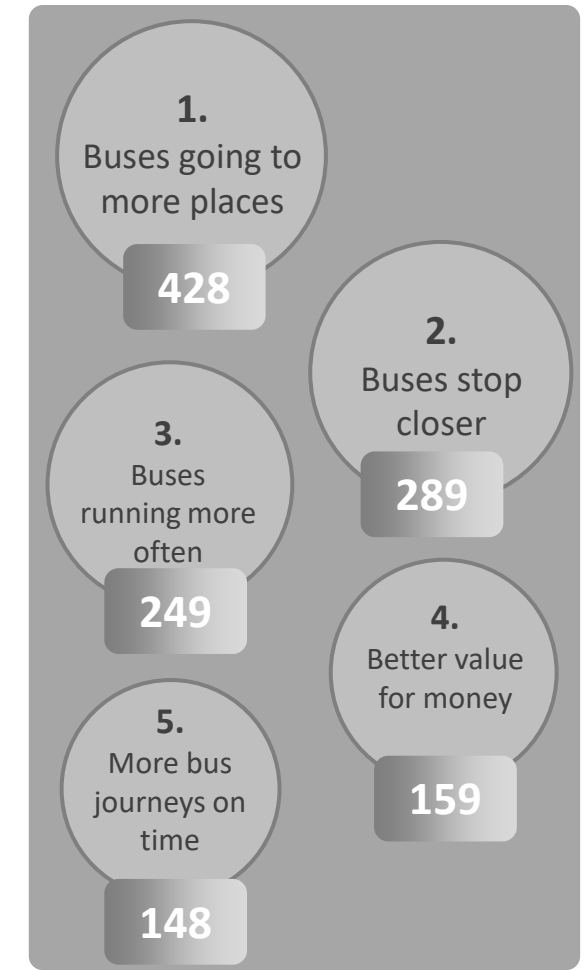
20-34 years



35-64 years



65+ years



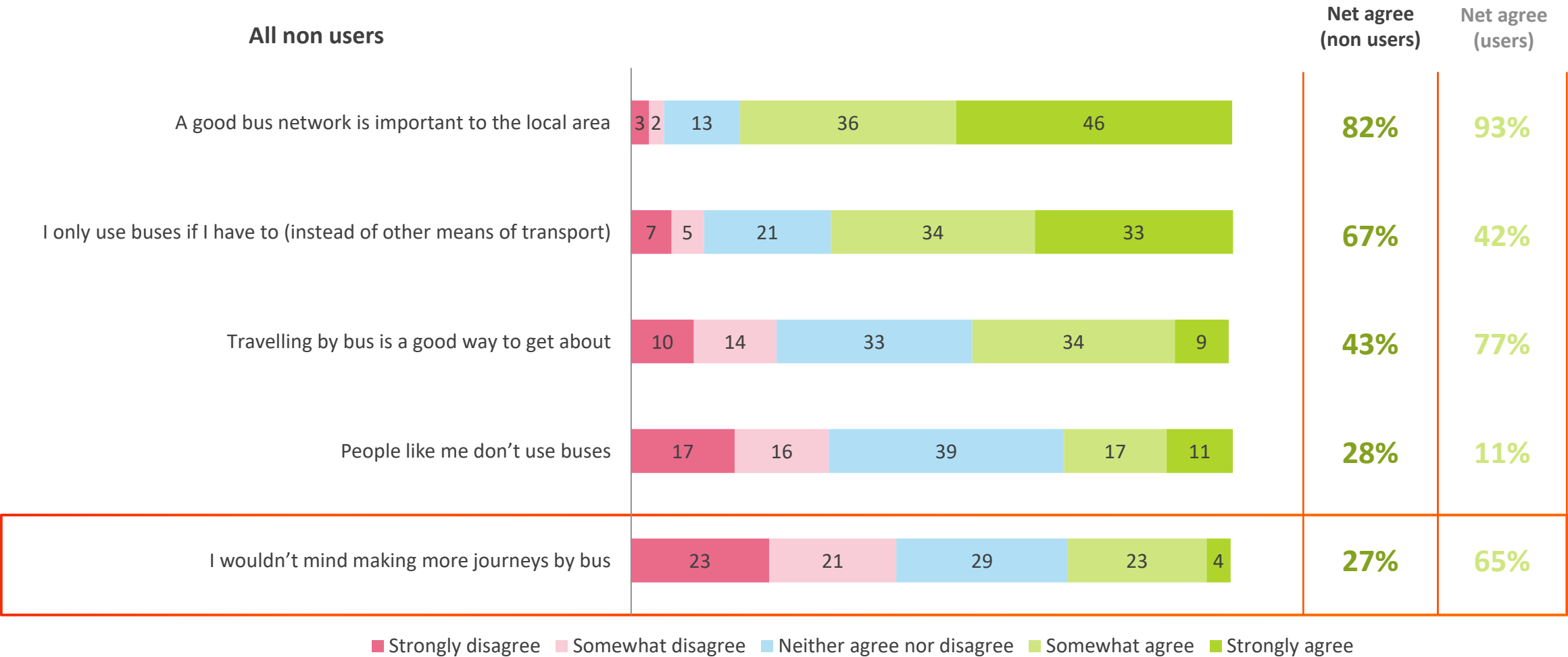
Q14. Please tick the improvement you think most people would want to see made and the one believe they would think is least important

Base: 14-19: 199 / 20-34: 471 / 35-64: 697 / 65+: 333

Improvements – based on MaxDiff analysis

Good bus network is considered to be most important for the local area

Attitude to buses – non users





Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
Base: Non bus users: 1,566

Female and older more open to making more bus journeys

Attitude to buses – non users

But convincing will be a challenge. A third of them agree with “people like me don’t use buses”

	All non users Net agree			14-19	20-34	35-64	65+	Between every 4 months and a year	Less than once a year	Rarely/ never
A good bus network is important to the local area	82%	81	83	78	78	83	87↑	90	84	78↓
I only use buses if I have to (instead of other means of transport)	67%	64	69	65	73↑	65	61↓	72	72↑	62↓
Travelling by bus is a good way to get about	43%	42	44	46	43	44	41	54↑	45	38↓
People like me don't use buses	28%	33↑	24↓	31	27	27	29	17↓	26	33↑
I wouldn't mind making more journeys by bus	27%	31↑	24↓	34	21↓	26	36↑	37↑	30	22↓

Significant difference to non-users

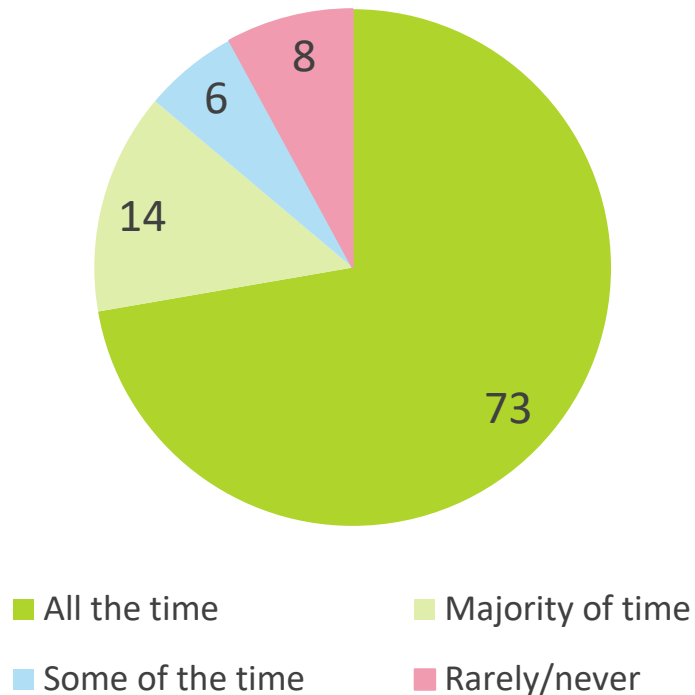
 Lower
  Higher

Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
 Base: Non bus users: 1,566 / Male: 680 / Female: 886 / 14-19:180 / 20-34:423 / 35-64: 645 / 65+:318

And almost 9 in 10 have a car available at least for the majority of time

Older respondents are those with most car access

Car access (%)



Opportunities to increase usage: non-users

Car access by gender (%)



Car access by age (%)



Q27. How often is a car/motorbike available to you?

Base: No bus users: 1,700 / Male: 739 / Female: 961 / 14-19: 199 / 20-34: 471 / 35-64: 697 / 65+: 333

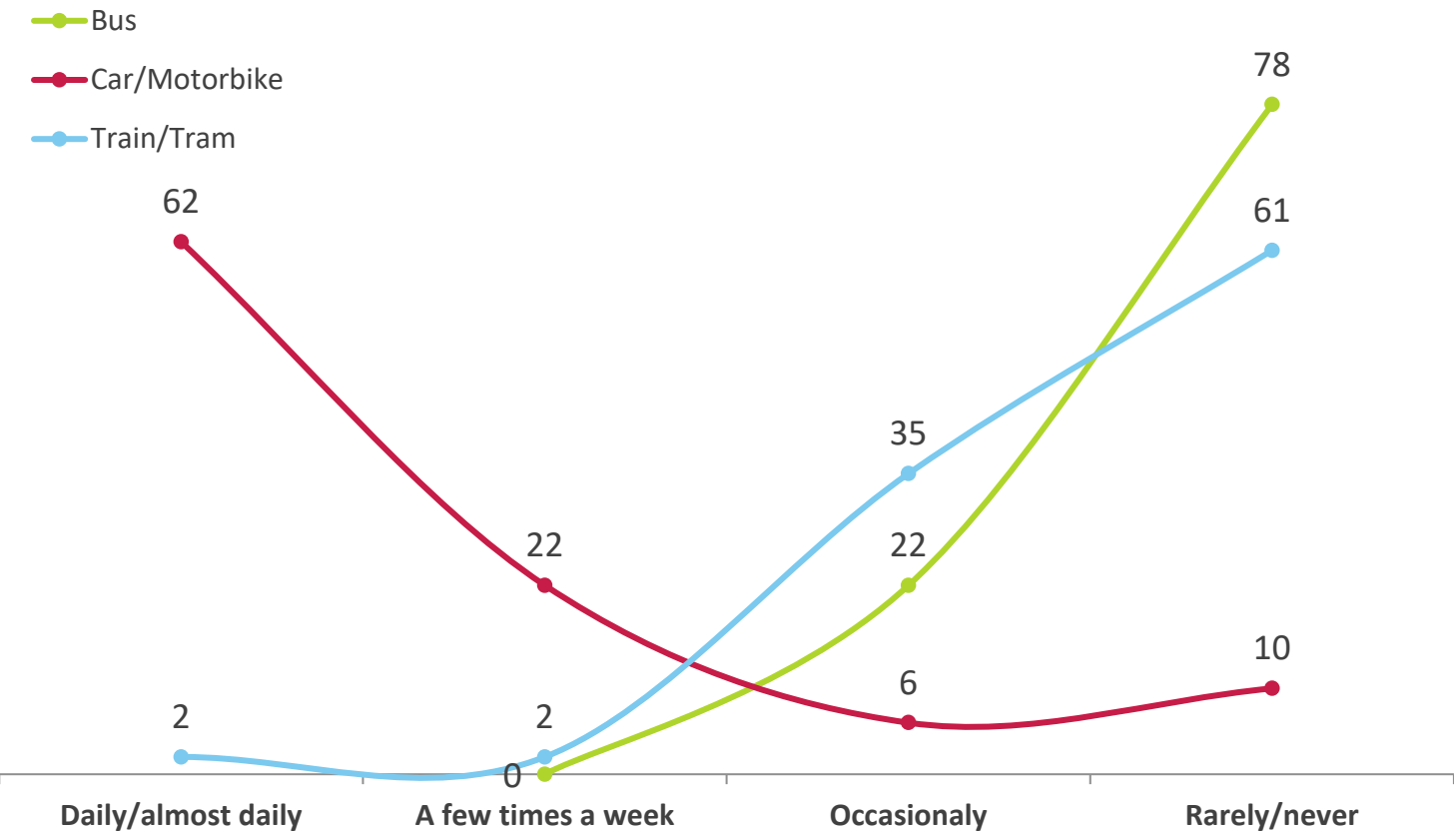
Significant difference to non-users

Lower Higher

Most are making frequent car journeys, but fewer make train/tram trips

Opportunities to increase usage: non-users

Frequency of usage of transport modes (%)



84%

of non users make journeys by
car/motorbike journeys
at least a few times per week

4%

of non users make journeys by
train/tram journeys
at least a few times per week

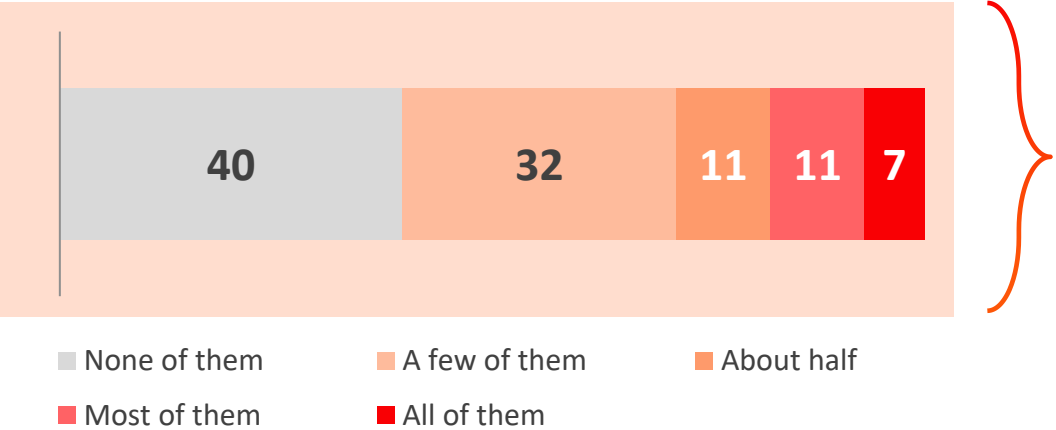
Q7. In a typical week how frequently do you use the following modes of transport?
Base: All non bus users : 1,700

...but only 18% (of the 84%) feel these journeys could be made by bus

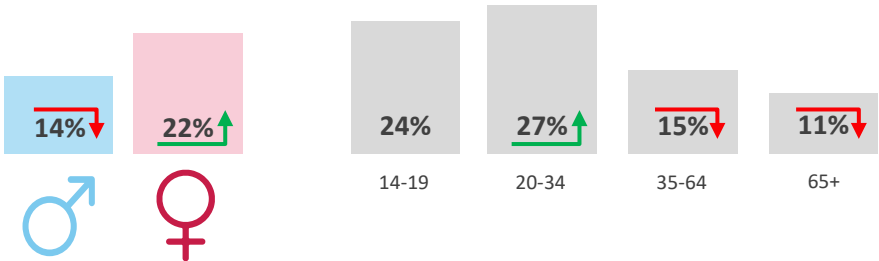
Slightly higher opportunity among females and under 35s

Opportunities to increase usage: non-users

% that make car/motorbike journeys that could be made by bus



Those who could be using the bus instead of the car for at least most of the journeys



Q8. How many of your week's [Non bus] journeys could be made by bus?
Base: non bus users : Car journeys: 1416

Significant difference to non-users

Lower Higher

Of those users who can make their car journeys by bus (the 18% of the 84%); they do not really differ in attitude to non-users as a group.

Opportunities to increase usage – non-users

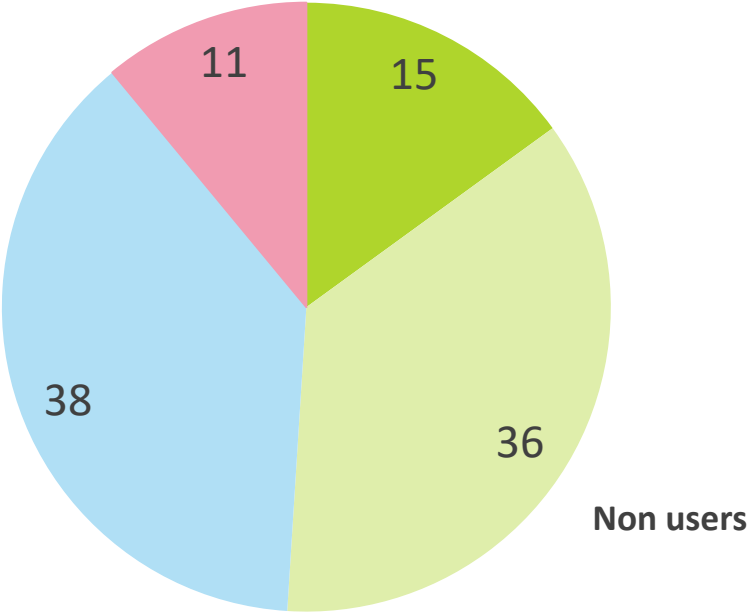
	Among those who could make most/all car journeys by bus (%)	All non-users Level of agreement
A good bus network is important to the local area	88	82
Travelling by bus is a good way to get about	47	43
I wouldn't mind making more journeys by bus	24	27
I only use buses if I have to (instead of other means of transport)	76	67
People like me don't use buses	30	28

Q10. To what extent to you agree or disagree with the following statements about travelling by bus?
Base: Receptive non users: 259, all non-users 20+: 1566

About half believe that buses can play a part in reducing air pollution (very similar to users)

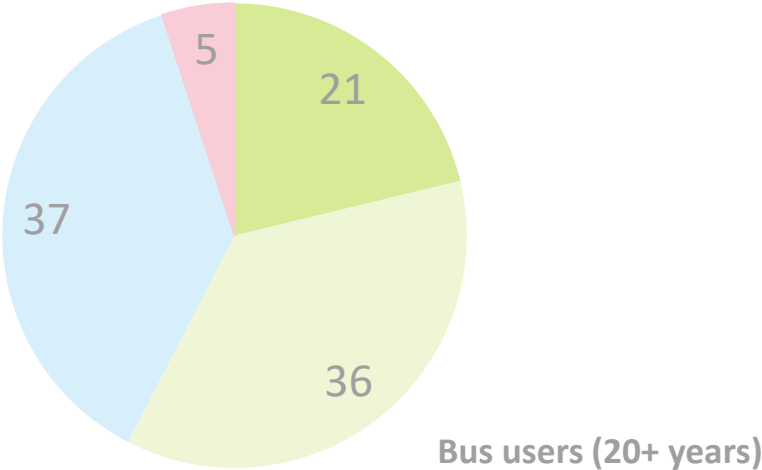
Opportunities to increase usage: non-users

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



■ Large extent ■ Resonable extent ■ Some extent ■ Little/None

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



Bus users (20+ years)

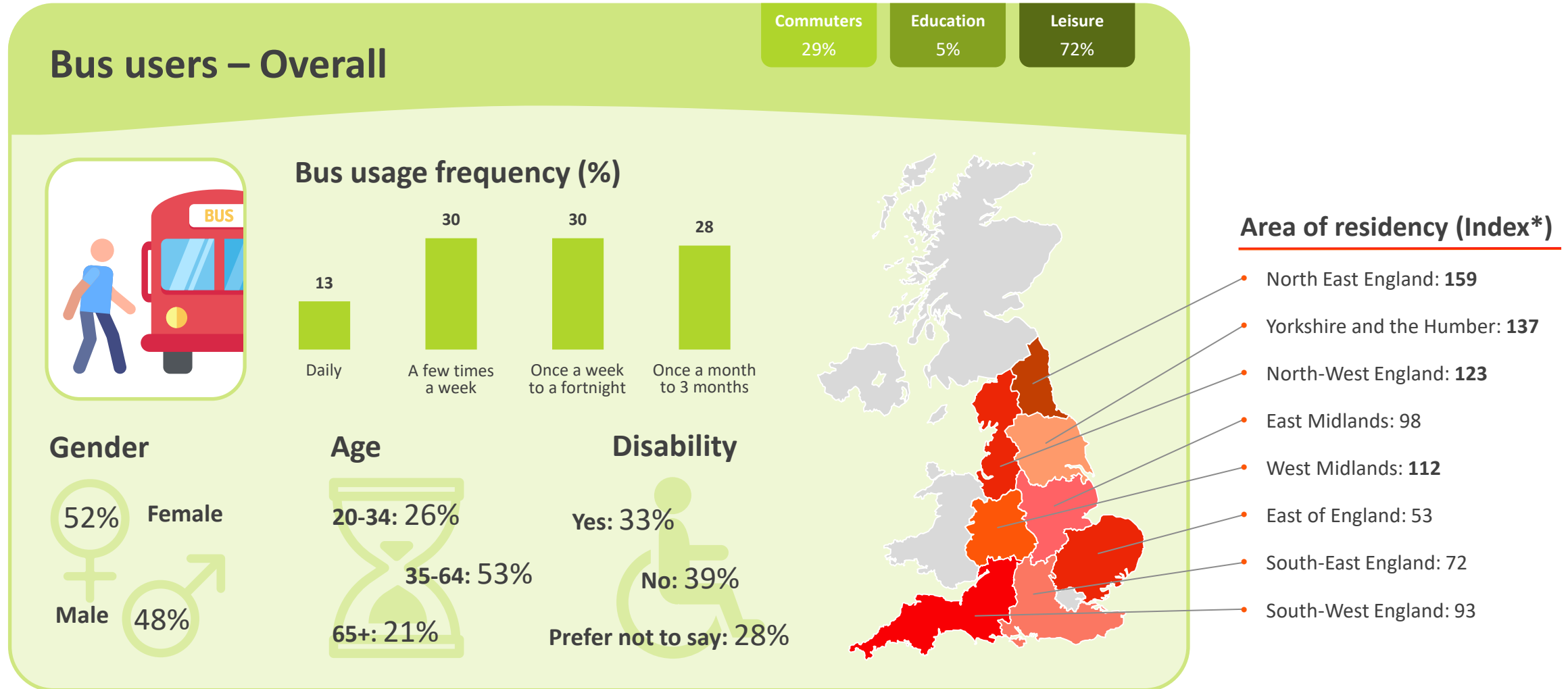
Q15. To what extent do you think buses can play a part in reducing air pollution?
Base: All respondents 20+ years old: 5,000 / Non bus users: 1,700

Profile of users, youth users and non-users

Most bus users are around once a week

They primarily use the bus for leisure purposes

Profile/usage - users



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

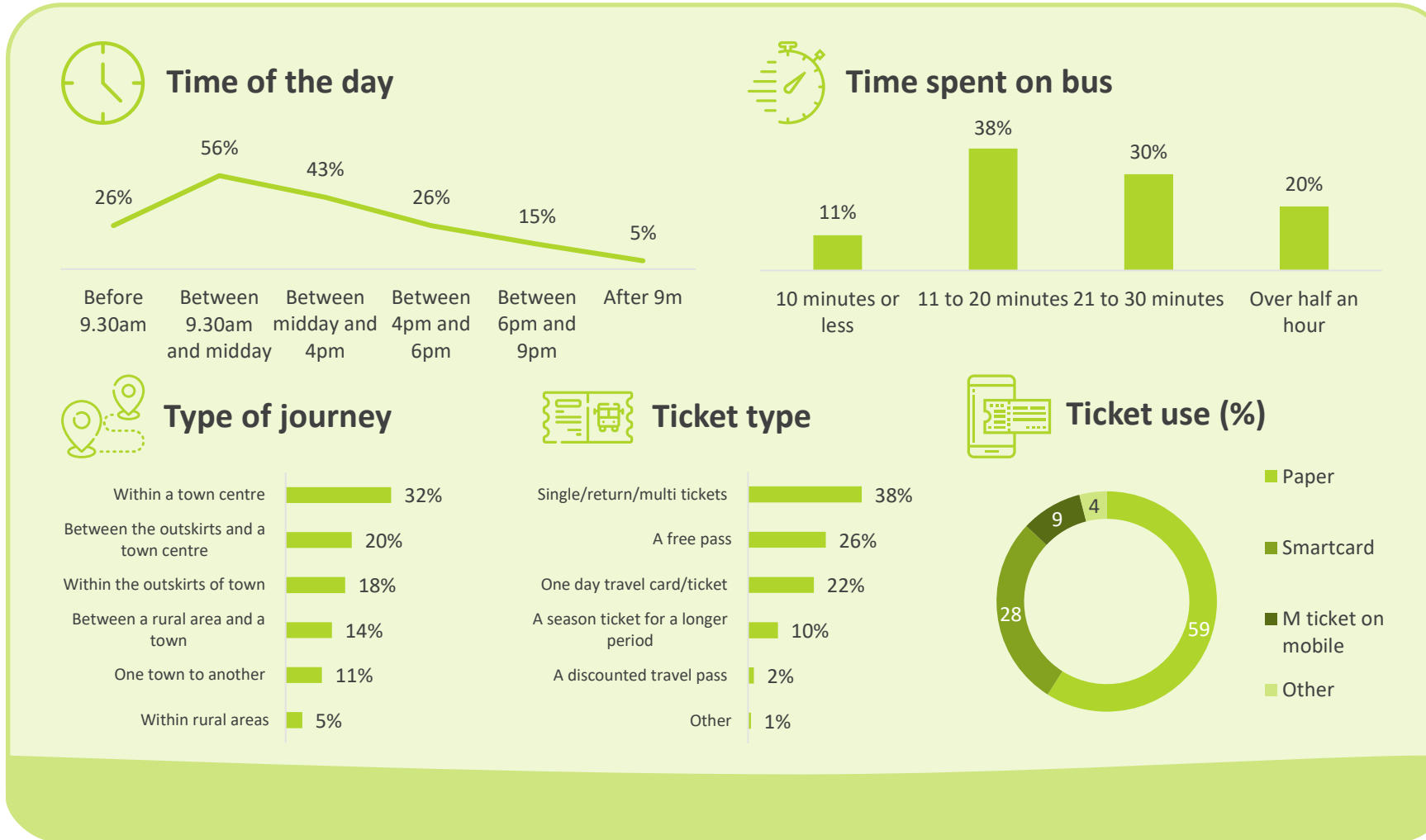
Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

* Indexed on population
estimate of England in 2018
by region - Statisat.com

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

Profile/usage - users

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.

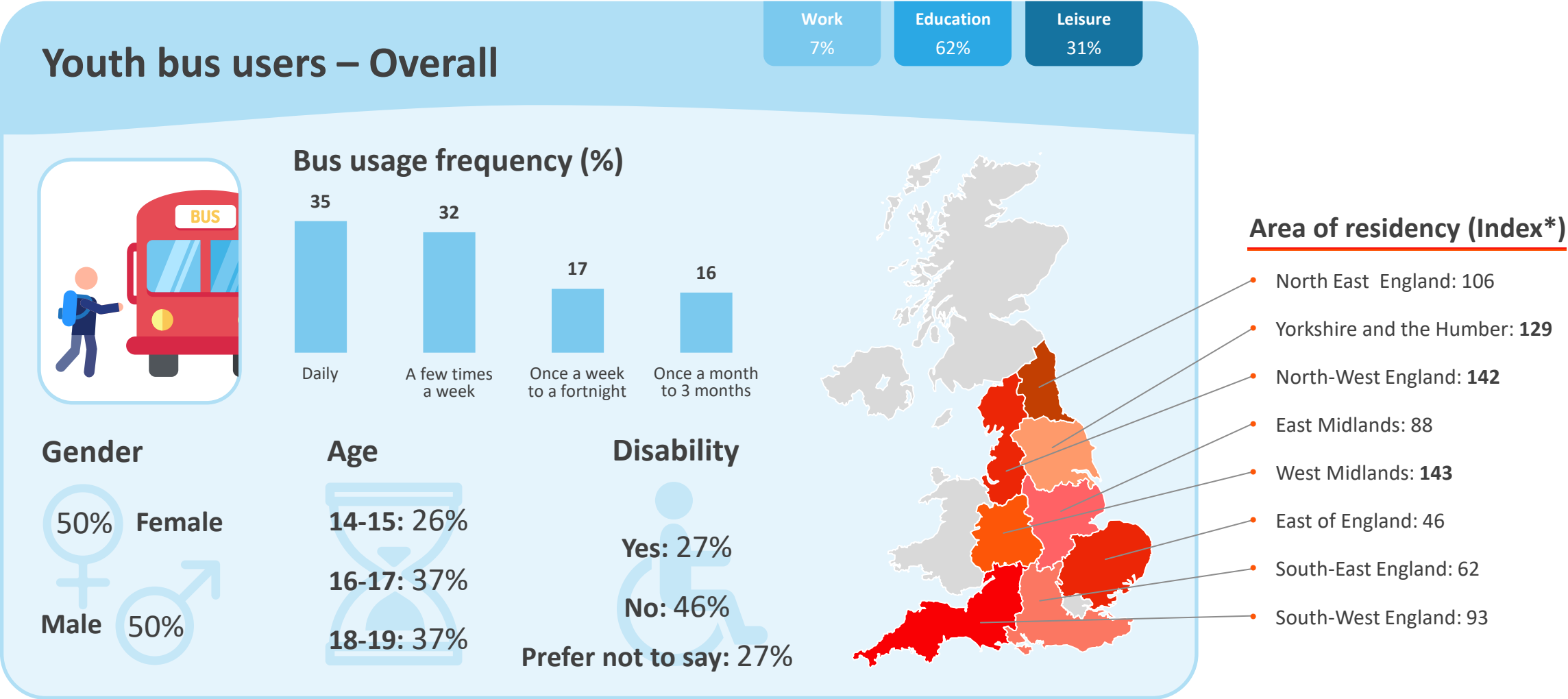
Base: Bus users (20+): 5,000

Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

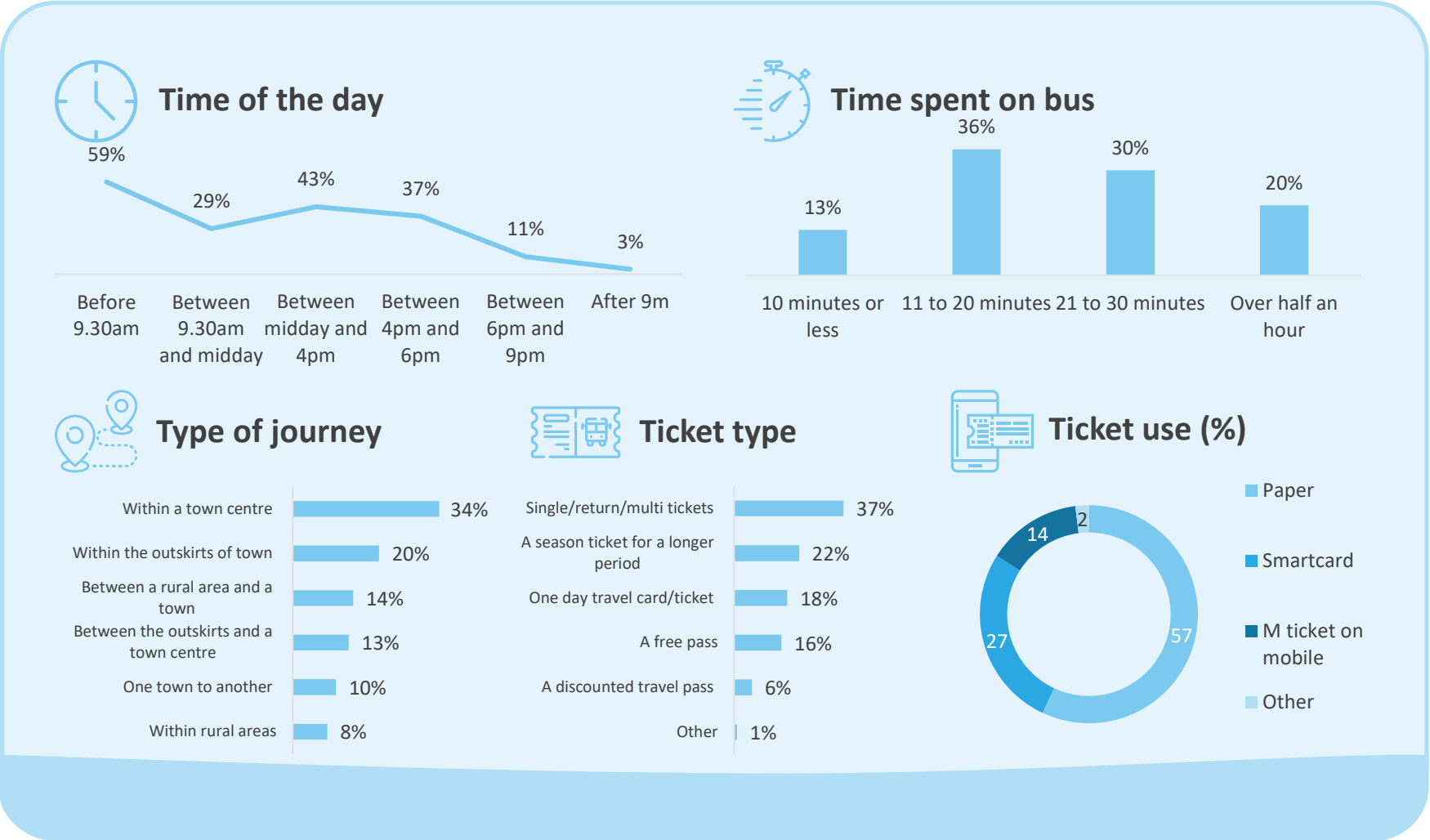
Most travel at least a few times a week and primarily for education

Profile/usage: youth users

Index higher in North West, West Midlands and Yorkshire/Humber



Youth: usage closely linked to school timings

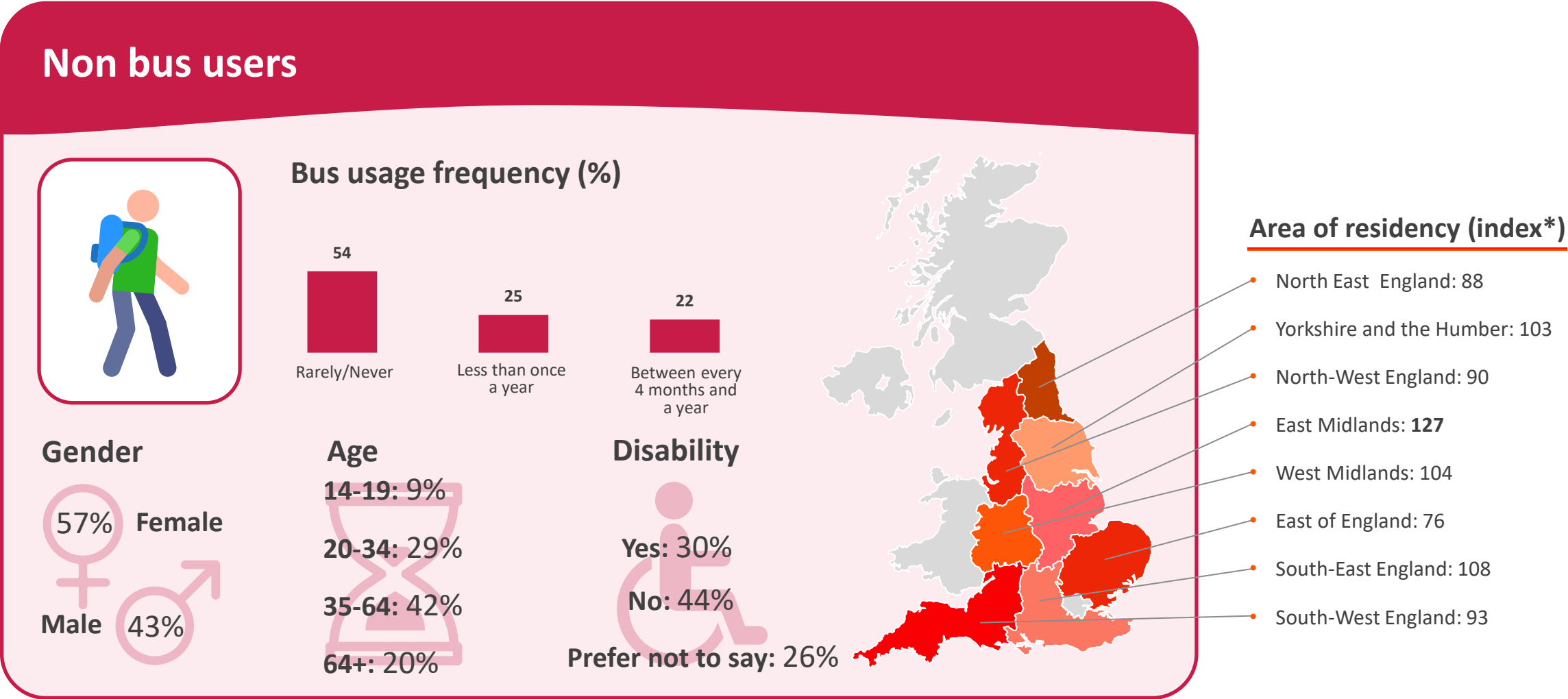


Q17 For which type of journey do you mainly use the bus? / Q18. When you use the bus are the journeys... / Q19. Typically how long is the part on the bus?
Q22. And at what times of day do you travel by bus? / Q21. Form of ticket used.
Base: Youth bus users : 846

More likely to be women and in the 35-64 year age bracket

Profile/usage – non users

East Midlands indexes higher on non-users



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?
Q29. Are you affected by any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?
Base: Non bus users : 1,700
Confidential & Proprietary – Copyright BVA Group / BDRC © 2019

* Indexed on population estimate of England in 2018 by region - Statisat.com



About BVA BDRC

transportfocus 



Who we are - BVA BDRC

BVA BDRC is an award winning international consumer insight consultancy, conducting research in over 90 countries. The agency, part of Paris-based BVA Group, offers the complete range of research consulting and business transformation. We help brands get closer to their customers, improve customer experience and grow the bottom line.

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:



Brands



Channels



Compliance



Products



Customers



Employees



Markets



Data Science



Hotels



Media



Transport



Finance



Travel & Tourism



Retail

Sector specialisms



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