



# Bus passengers' priorities for improvement

September 2020



# Foreword

We asked 5000 passengers across England (outside London) to rank a series of 30 possible improvements to their bus service in order of priority. The results provide a clear sense of passengers' aspirations; we will ensure that their voice is heard when important strategic decisions about bus services and investment are made up and down the country.

**T**he research found passengers' top priority for improvement is buses running more often, with buses going to more places a close second. While passengers relying on key corridors and destinations may be well served, particularly at busy times, those travelling elsewhere or outside those hours may not be so lucky. The third highest priority is more buses on time; passengers need to be able to count on the timetable. Improving value for money comes next. It is likely that pressure on the network, congestion on the roads and rising fares have contributed to the falls we saw in bus patronage before the impact of the pandemic hit. It may be hard to reverse that trend without concerted action to address these basic concerns.

Young people agreed that buses running more often was the top priority for improvement.

More buses on time at the stop and better value for money also featured towards the top of their list together with faster journey times. However, having free Wi-Fi widely available as their second highest priority suggests that they place a high value on making good use of their time while they are travelling.

We also asked 1700 non-users to rank their priorities for improvement. Buses going to more places came slightly ahead of their second highest priority which was buses running more often followed by better value for money.

Significant minorities of each group felt that most or all of their regular car journeys could be made by bus. This was three in 10 passengers as a whole, rising to four in 10 among young passengers and fell to just under two in 10 non-users. A clear majority of passengers were open to doing so while for non-

users it was only one in four. A majority of each group felt that buses can play a part in reducing air pollution, although most do not currently hold strong opinions. There is an opportunity here for the bus industry.

Since the research was undertaken bus services have, like the rest of our lives, been dramatically changed by the Covid-19 pandemic. In the short-term Covid-19 is bound to have an impact on passengers' priorities – not least when it comes to personal safety, space on the bus and cleanliness – but the baseline results will still be relevant. An improved network, more punctual buses and value for money will still be important in a post-lockdown world.

**David Sidebottom**  
Director

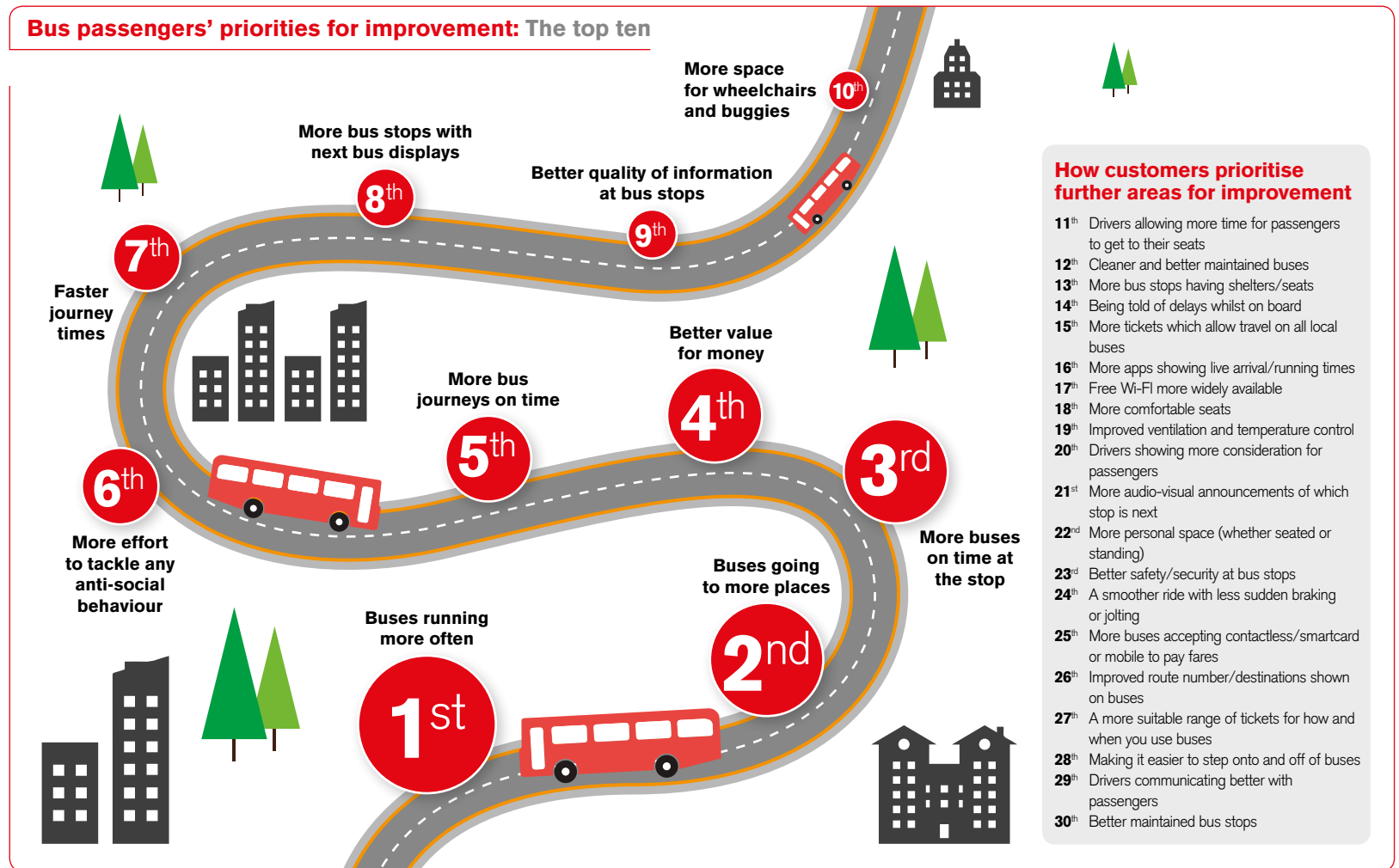
# Introduction

5000 bus users (using the bus at least every quarter) across the country were asked to rank a series of 30 possible improvements to their bus service in order of priority. The highest priority for improvement is buses running more often, followed closely by buses going to more places and more buses on time at the stop.

The large sample size allows the findings to be 'cut' in a number of ways, including by age (highlighted later in this publication) and journey purpose.

Bespoke analysis can also be carried out using a 'simulator' tool that can be used to run priorities for different sectors or groups of passengers. The simulator also allows users to remove specific priorities and to re-run the analysis. For example you could look at how priorities change if say 'buses going to more places you want them to' or 'better value for money from bus journeys' is excluded, or both are excluded. The simulator tool, along with instructions on how to use it, can be found on our website.

## Bus passengers' priorities for improvement: The top ten



## How customers prioritise further areas for improvement

- 11<sup>th</sup>** Drivers allowing more time for passengers to get to their seats
- 12<sup>th</sup>** Cleaner and better maintained buses
- 13<sup>th</sup>** More bus stops having shelters/seats
- 14<sup>th</sup>** Being told of delays whilst on board
- 15<sup>th</sup>** More tickets which allow travel on all local buses
- 16<sup>th</sup>** More apps showing live arrival/running times
- 17<sup>th</sup>** Free Wi-Fi more widely available
- 18<sup>th</sup>** More comfortable seats
- 19<sup>th</sup>** Improved ventilation and temperature control
- 20<sup>th</sup>** Drivers showing more consideration for passengers
- 21<sup>st</sup>** More audio-visual announcements of which stop is next
- 22<sup>nd</sup>** More personal space (whether seated or standing)
- 23<sup>rd</sup>** Better safety/security at bus stops
- 24<sup>th</sup>** A smoother ride with less sudden braking or jolting
- 25<sup>th</sup>** More buses accepting contactless/smartcard or mobile to pay fares
- 26<sup>th</sup>** Improved route number/destinations shown on buses
- 27<sup>th</sup>** A more suitable range of tickets for how and when you use buses
- 28<sup>th</sup>** Making it easier to step onto and off of buses
- 29<sup>th</sup>** Drivers communicating better with passengers
- 30<sup>th</sup>** Better maintained bus stops



# Findings

## Overall priorities for improvement

The research used a methodology known as Maximum Difference Scaling (MaxDiff) which asks passengers to trade-off one priority for improvement against others. A fuller explanation of MaxDiff and the sampling plan used is given in the appendix.

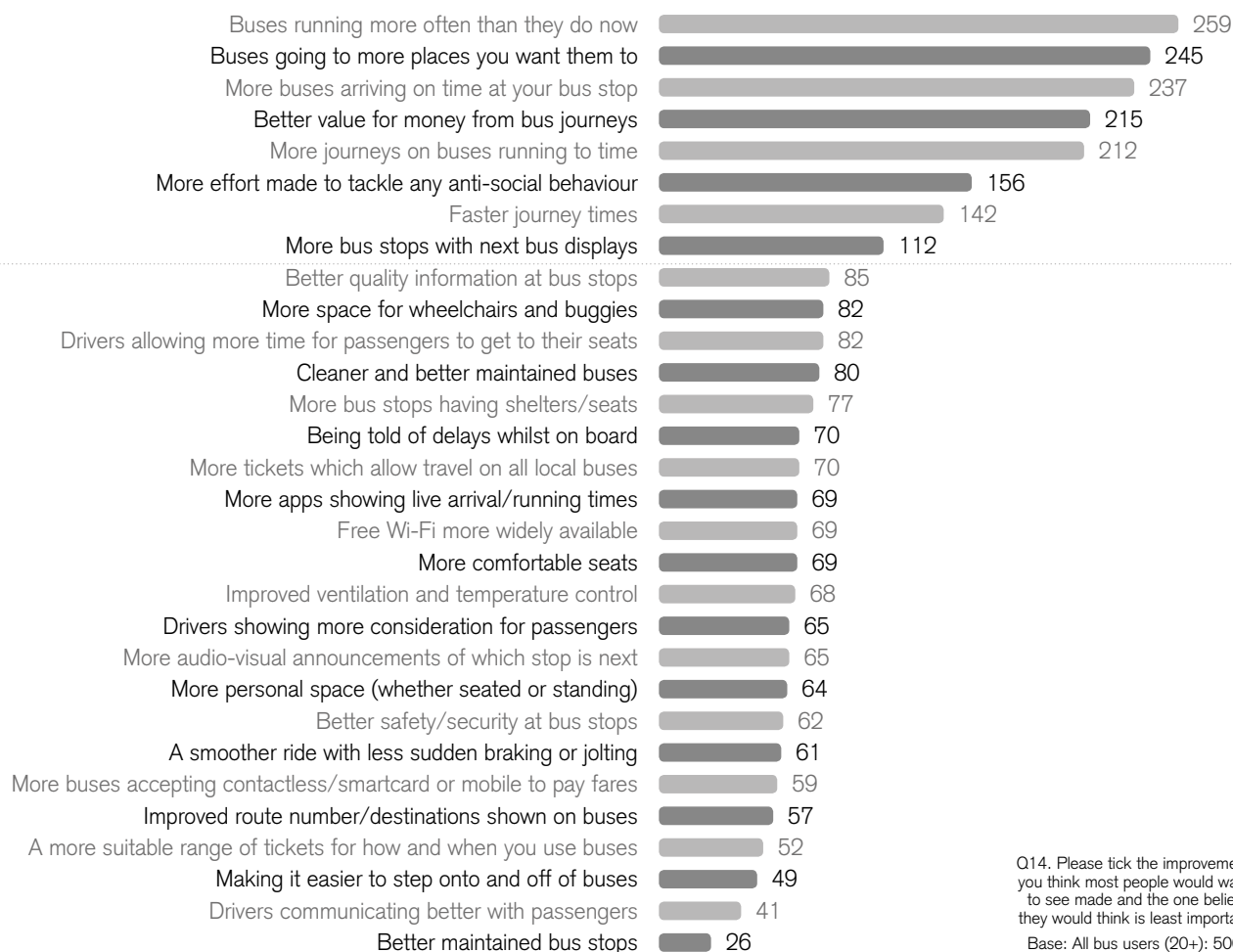
By using this technique we can present the results in terms of the rank order of priority (with one being the highest priority for improvement and 30 the lowest); and in terms of the relative order of priority (by how much more, or less, important one factor is compared to another).

The chart shows both the rank order and relative level of priority for passengers throughout England (outside London). To assess the relative ranking we use an index score. A score of 100 means that a criterion is of average importance; anything ranked over 100 has above average importance and anything below 100 has less than average importance. So, for example, an index of 150 means that it is 50 per cent more important than average; a score of 200 means it is twice as important as average; while a score of 50 means that it is half as important as average.

It is important to bear in mind that passengers were asked to rank these criteria in terms of their priority for improvement rather than how important they were to them overall. A lower score does not necessarily mean that something is unimportant as it could be very important but passengers are relatively happy with the way it is currently being delivered.

Buses running more often is the highest priority for improvement, just over two and a half times higher than the average followed by buses going to more places and more buses on time, just under two and half times higher than the average.

### Top priorities for improvement: buses running more often, going more places and being on time



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+): 5000

# Priorities by age

Analysis by age reveals some interesting differences in priorities. Passengers aged 35 to 64 rate value for money highest, but this is a much lower priority for older passengers (who qualify for free passes). Free Wi-Fi and faster journey times are among the top priorities of young passengers aged 14 to 19.

## Rank of bus users by age

|   | Priority scores all age 20+ | Rank all age 20+ | Priority scores age 14-19 | Rank age 14-19 | Priority scores age 20-34 | Rank age 20-34 | Priority scores age 35-64 | Rank age 35-64 | Priority scores age 65+ | Rank age 65+ |
|---|-----------------------------|------------------|---------------------------|----------------|---------------------------|----------------|---------------------------|----------------|-------------------------|--------------|
| Buses running more often than they do now                         | 259                         | 1                | 247                       | 1              | 199                       | 3              | 267                       | 2              | 316                     | 1            |
| Buses going to more places you want them to                       | 245                         | 2                | 187                       | 6              | 202                       | 2              | 246                       | 3              | 298                     | 2            |
| More buses arriving on time at your bus stop                      | 237                         | 3                | 217                       | 3              | 204                       | 1              | 236                       | 4              | 283                     | 3            |
| Better value for money from bus journeys                          | 215                         | 4                | 197                       | 5              | 191                       | 4              | 273                       | 1              | 97                      | 11           |
| More journeys on buses running to time                            | 212                         | 5                | 171                       | 7              | 180                       | 5              | 214                       | 5              | 245                     | 4            |
| More effort made to tackle any anti-social behaviour              | 156                         | 6                | 139                       | 8              | 155                       | 6              | 157                       | 6              | 153                     | 6            |
| Faster journey times  | 142                         | 7                | 215                       | 4              | 154                       | 7              | 152                       | 7              | 101                     | 9            |
| More bus stops with next bus displays                             | 112                         | 8                | 86                        | 11             | 105                       | 9              | 100                       | 8              | 154                     | 5            |
| Better quality information at bus stops                           | 85                          | 9                | 75                        | 14             | 89                        | 13             | 78                        | 10             | 98                      | 10           |
| More space for wheelchairs and buggies                            | 82                          | 10               | 65                        | 20             | 113                       | 8              | 71                        | 14             | 69                      | 16           |
| Drivers allowing more time for passengers to get to their seats   | 82                          | 11               | 56                        | 25             | 71                        | 20             | 77                        | 11             | 107                     | 8            |
| Cleaner and better maintained buses                               | 80                          | 12               | 90                        | 10             | 89                        | 12             | 76                        | 12             | 78                      | 14           |
| More bus stops having shelters/seats                              | 77                          | 13               | 48                        | 26             | 62                        | 25             | 68                        | 15             | 118                     | 7            |
| Being told of delays whilst on board                              | 70                          | 14               | 80                        | 12             | 91                        | 11             | 64                        | 16             | 60                      | 21           |
| More tickets which allow travel on all local buses                | 70                          | 15               | 66                        | 17             | 75                        | 18             | 82                        | 9              | 33                      | 27           |
| More apps showing live arrival/running times                      | 69                          | 16               | 95                        | 9              | 104                       | 10             | 64                        | 17             | 38                      | 26           |
| Free Wi-Fi more widely available                                  | 69                          | 17               | 223                       | 2              | 85                        | 15             | 73                        | 13             | 42                      | 25           |
| More comfortable seats  | 69                          | 18               | 59                        | 23             | 66                        | 23             | 62                        | 20             | 88                      | 12           |
| Improved ventilation and temperature control                      | 68                          | 19               | 65                        | 21             | 79                        | 17             | 63                        | 19             | 68                      | 17           |
| Drivers showing more consideration for passengers                 | 65                          | 20               | 67                        | 16             | 63                        | 24             | 64                        | 18             | 69                      | 15           |
| More audio-visual announcements of which stop is next             | 65                          | 21               | 66                        | 19             | 80                        | 16             | 57                        | 25             | 64                      | 19           |
| More personal space (whether seated or standing)                  | 64                          | 22               | 77                        | 13             | 71                        | 21             | 59                        | 24             | 65                      | 18           |
| Better safety/security at bus stops                               | 62                          | 23               | 71                        | 15             | 69                        | 22             | 62                        | 21             | 55                      | 22           |
| A smoother ride with less sudden braking or jolting               | 61                          | 24               | 43                        | 28             | 53                        | 28             | 56                        | 26             | 83                      | 13           |
| More buses accepting contactless/smartcard or mobile to pay fares | 59                          | 25               | 66                        | 18             | 85                        | 14             | 60                        | 22             | 24                      | 29           |
| Improved route number/destinations shown on buses                 | 57                          | 26               | 61                        | 22             | 74                        | 19             | 54                        | 27             | 46                      | 23           |
| A more suitable range of tickets for how and when you use buses   | 52                          | 27               | 58                        | 24             | 61                        | 26             | 60                        | 23             | 21                      | 30           |
| Making it easier to step onto and off of buses                    | 49                          | 28               | 34                        | 29             | 54                        | 27             | 43                        | 28             | 61                      | 20           |
| Drivers communicating better with passengers                      | 41                          | 29               | 45                        | 27             | 44                        | 29             | 40                        | 29             | 42                      | 24           |
| Better maintained bus stops                                       | 26                          | 30               | 31                        | 30             | 32                        | 30             | 24                        | 30             | 25                      | 28           |
| Sample size   | 5000                        |                  | 846                       |                | 1320                      |                | 2643                      |                | 1037                    |              |

## Priorities for non-users

Non-users were asked to rate 19 potential options (we excluded those relating directly to the on-bus experience). Buses going to more places was far and away the top priority for improvement, followed by buses running more often and better value for money. With the exception of non-users over 65 years old, all non-user age groups rated more destinations, higher frequencies and better value for money as their top three priorities for improvement. For older non-users, making it easier to get to and from the bus stop is more of a concern than improving value for money.

### Non user priorities by age

|   | Priority scores all ages | Rank all ages | Priority scores age 14-19 | Rank age 14-19 | Priority scores age 20-34 | Rank age 20-34 | Priority scores age 35-64 | Rank age 35-64 | Priority scores age 65+ | Rank age 65+ |
|---|--------------------------|---------------|---------------------------|----------------|---------------------------|----------------|---------------------------|----------------|-------------------------|--------------|
| Buses going to more places people want them to            | 313                      | 1             | 235                       | 1              | 259                       | 1              | 316                       | 1              | 428                     | 1            |
| Buses running more often than they do now                 | 212                      | 2             | 174                       | 3              | 196                       | 3              | 216                       | 3              | 249                     | 3            |
| Better value for money from bus journeys                  | 209                      | 3             | 197                       | 2              | 227                       | 2              | 225                       | 2              | 159                     | 4            |
| Buses stops closer to home/destination                    | 170                      | 4             | 113                       | 6              | 116                       | 8              | 165                       | 5              | 289                     | 2            |
| More bus services running on time                         | 165                      | 5             | 149                       | 5              | 177                       | 4              | 169                       | 4              | 148                     | 5            |
| Faster journey times                                      | 151                      | 6             | 157                       | 4              | 171                       | 5              | 158                       | 6              | 106                     | 6            |
| More effort made to tackle anti-social behaviour on buses | 121                      | 7             | 113                       | 7              | 130                       | 6              | 123                       | 7              | 106                     | 7            |
| Live bus times available on a smartphone                  | 85                       | 8             | 101                       | 9              | 119                       | 7              | 78                        | 9              | 41                      | 11           |
| Buses running earlier/later in the day                    | 81                       | 9             | 77                        | 11             | 85                        | 9              | 86                        | 8              | 65                      | 8            |
| Paying fares by mobile/contactless card                   | 56                       | 10            | 83                        | 10             | 77                        | 10             | 49                        | 11             | 24                      | 17           |
| Easier to get info on bus routes and timetables           | 50                       | 11            | 55                        | 13             | 56                        | 11             | 49                        | 10             | 39                      | 13           |
| More comfort on buses                                     | 46                       | 12            | 53                        | 14             | 47                        | 13             | 46                        | 12             | 43                      | 10           |
| Cleaner buses   | 43                       | 13            | 50                        | 15             | 48                        | 12             | 42                        | 13             | 32                      | 15           |
| Drivers showing more consideration to passengers          | 40                       | 14            | 49                        | 17             | 39                        | 15             | 39                        | 14             | 40                      | 12           |
| Easier to get onto and off buses                          | 39                       | 15            | 41                        | 18             | 34                        | 16             | 37                        | 15             | 50                      | 9            |
| Easier to get fares information                           | 38                       | 16            | 50                        | 16             | 42                        | 14             | 37                        | 16             | 26                      | 16           |
| Special fares for teenagers                               | 30                       | 17            | 108                       | 8              | 23                        | 19             | 20                        | 19             | 13                      | 18           |
| Bus companies getting more involved in the local area     | 27                       | 18            | 36                        | 19             | 25                        | 18             | 23                        | 17             | 32                      | 14           |
| More technology on board (Wi-Fi and charging)             | 26                       | 19            | 59                        | 12             | 30                        | 17             | 21                        | 18             | 10                      | 19           |
|   | 1700                     |               | 199                       |                | 471                       |                | 697                       |                | 333                     |              |

# Trends over time

Bus passengers' top priorities in 2016 were better value for money, more buses on time and buses running more often than they do now, followed by more effort to tackle anti-social behaviour and buses going to more places. The most striking change is the increase in the rating for buses going to more places, lifting it from sixth in 2016 to a close second in 2019.

## User priorities

|   | 2020        | 2016        |
|---|-------------|-------------|
| Buses running more often than they do now                         | 259         | 224         |
| Buses going to more places you want them to                       | 245         | 158         |
| More buses arriving on time at your bus stop                      | 237         | 247         |
| Better value for money from bus journeys                          | 215         | 258         |
| More journeys on buses running to time                            | 212         | 228         |
| More effort made to tackle any anti-social behaviour              | 156         | 174         |
| Faster journey times  | 142         | 66          |
| More bus stops with next bus displays                             | 112         | 121         |
| Better quality information at bus stops                           | 85          | 87          |
| More space for wheelchairs and buggies                            | 82          | 44          |
| Drivers allowing more time for passengers to get to their seats   | 82          | 103         |
| Cleaner and better maintained buses                               | 80          | 107         |
| More bus stops having shelters/seats*                             | 77          | 61          |
| Being told of delays whilst on board                              | 70          | 110         |
| More tickets which allow travel on all local buses                | 70          | 107         |
| More apps showing live arrival/running times                      | 69          | 48          |
| Free Wi-Fi more widely available                                  | 69          | 72          |
| More comfortable seats  | 69          | 69          |
| Improved ventilation and temperature control                      | 68          | 61          |
| Drivers showing more consideration for passengers                 | 65          | 86          |
| More audio-visual announcements of which stop is next             | 65          | 74          |
| More personal space (whether seated or standing)                  | 64          | 74          |
| Better safety/security at bus stops                               | 62          | 104         |
| A smoother ride with less sudden braking or jolting               | 61          | 86          |
| More buses accepting contactless/smartcard or mobile to pay fares | 59          | 53          |
| Improved route number/destinations shown on buses                 | 57          | 52          |
| A more suitable range of tickets for how and when you use buses   | 52          | 78          |
| Making it easier to step onto and off of buses                    | 49          | 46          |
| Drivers communicating better with passengers                      | 41          | 50          |
| Better maintained bus stops                                       | 26          | 29          |
| <b>Sample size</b>  | <b>5000</b> | <b>4664</b> |

\* in 2016 seating could have been on bus or at bus stops.





## Attitudes to buses

We asked about prevailing attitudes towards buses to gauge underlying sentiment and help build a picture about potentially greater use of buses.

The graphic on the right shows that across all users, youth users and non-users there is a strong view a good bus network is an important need for a local area. There is also a limited view on buses 'not being for people like me'. Fewer than half of non-users see buses as a good way to get about and two thirds only use buses if they have to.

### Agreeing with these statements (%)

|   | All users | Youth users | Non-users |
|---|-----------|-------------|-----------|
| A good bus network is important to the local area | 93        | 89          | 82        |
| Travelling by bus is a good way to get about      | 77        | 69          | 43        |
| I wouldn't mind making more journeys by bus       | 65        | 60          | 27        |
| I only use buses if I have to                     | 42        | 54          | 67        |
| People like me don't use buses                    | 11        | 11          | 28        |

## Opportunities to increase bus usage

Among the groups who make car journeys that logistically could be made by bus, it is worth noting each group's rating of 'I don't mind making more journeys by bus'. For those of them that are age 20+ it is 68 per cent compared to 65 per cent generally for age 20+ users. For youth users it is 62 per cent compared to 60 per cent and for non-users it is 24 per cent compared to 27 per cent for that non-using age group as a whole. This represents a challenge to make the bus appeal to non-users.





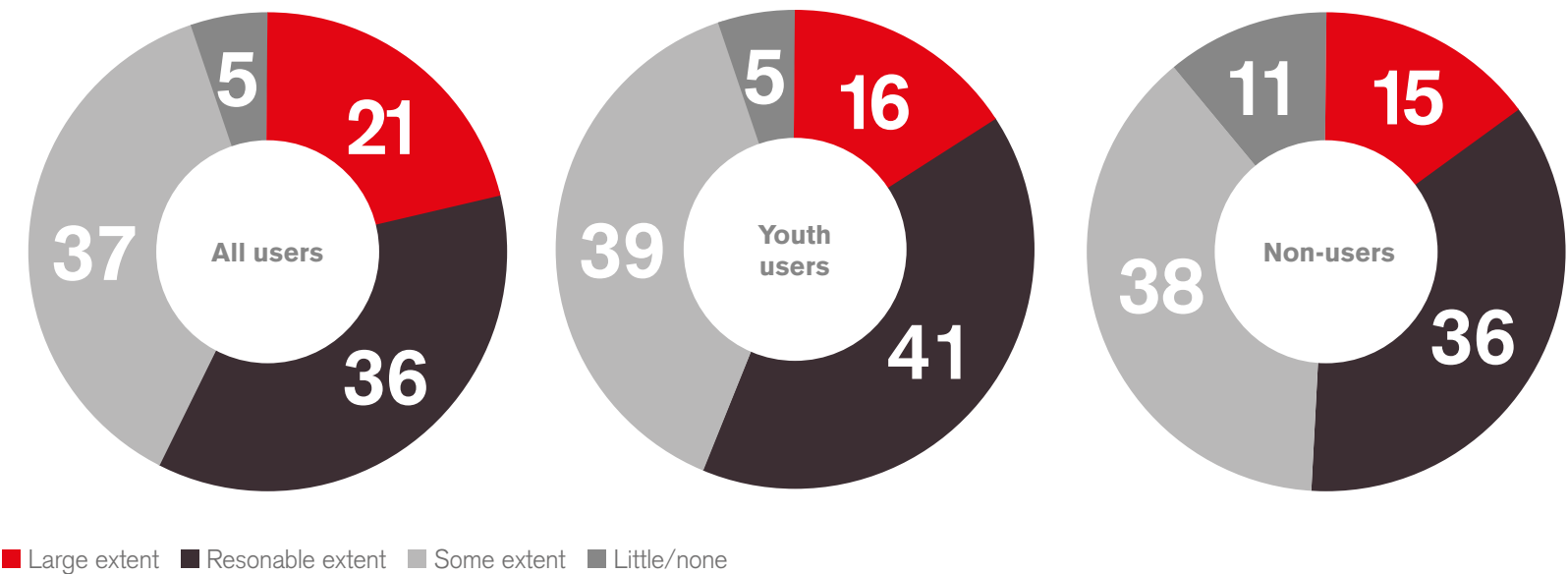
# Bus travel and air pollution

Over half of all bus passengers and non-users believe buses could play a part in reducing air pollution, but relatively few feel this strongly – just two out of 10 passengers overall and slightly fewer among young passengers.

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

Opportunities to increase usage for non-users

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



Q15. To what extent do you think buses can play a part in reducing air pollution?  
Base: All respondents 20+ years old: 5000 / Youth bus users: 846 / Non bus users: 1700

# Appendix

## Research approach

The survey was completed online from nationally representative research panels to achieve 7546 completes. This was 5000 for users of bus (defined as using at least once every three months); a segment of non-users (that naturally fell out of not being users) of 1700. There was a further segment to reach young people aged 14 to 18 to get at least 500 youth users. These youth users were added to those from the main segment aged 19 or below to form a view of the teenage user segment segment, achieving 846 responses in total. Those of the 14 to 18 age group who were not users were added to the non-user sample allowing the views of those aged 19 or below to be known.

To qualify for the survey panellists had to be living in England (outside London). The fieldwork ran from late March to early April 2019. Further detail on the methodology is available on request.

## Using Max-Diff to measure priorities for improvement

### What is Max-Diff:

Maximum Difference Scaling (Max-Diff) is a way of evaluating the importance (or preference) of a number of alternatives. It is a discrete choice technique where respondents are asked to make simple best/worst choices.

### How does Max-Diff work?

Participants complete a series of exercises. In each exercise they are presented with five items and asked to choose which is the highest priority for improvement and which is the lowest.

In order to determine passengers' overall priorities for improvement, the following exercise was used in the survey. It was repeated 18 times covering all 30 possible priorities.

The table below lists the 30 improvement priority areas included in the 2020 research, which were included in the Max-Diff exercise described previously. The second table below lists the areas that were included in the 2017 research but excluded from the 2020 wave of the research.

## Bus user priorities

### Bus network

- 1 Buses going to more places you want them to
- 2 Buses running more often than they do now
- 3 More journeys on buses running to time
- 4 Faster journey times
- 5 More buses arriving on time at your bus stop

### Bus information

- 6 More bus stops with next bus displays
- 7 More apps showing live arrival/running times
- 8 Being told of delays whilst on board
- 9 Better quality information at bus stops

### The bus itself

- 10 Improved route number/destinations shown on buses
- 11 More audio-visual announcements of which stop is next
- 12 Making it easier to step onto and off of buses
- 13 Cleaner and better maintained buses
- 14 Improved ventilation and temperature control
- 15 More comfortable seats
- 16 More personal space (whether seated or standing)
- 17 More space for wheelchairs and buggies
- 18 More effort made to tackle any anti-social behaviour
- 19 Free Wi-Fi more widely available

### **Tickets/payment**

- 20** More tickets which allow travel on all local buses
- 21** More buses accepting contactless/smartcard or mobile to pay fares
- 22** A more suitable range of tickets for how and when you use buses
- 23** Better value for money from bus journeys

### **Service/drivers**

- 24** Drivers showing more consideration for passengers
- 25** A smoother ride with less sudden braking or jolting
- 26** Drivers allowing more time for passengers to get to their seats
- 27** Drivers communicating better with passengers

### **Bus stop**

- 28** Better maintained bus stops
- 29** More bus stops having shelters/seats
- 30** Better safety/security at bus stops

## **Non-user priorities**

The non-users were shown screens of four possible improvements chosen from the list below at random and asked to rank the most favoured and least favoured. Each respondent was shown 10 such permutations.

- 1** Buses going to more places people want them to
- 2** Buses running more often than they do now
- 3** More bus services running on time
- 4** Faster journey times
- 5** Live bus times available on a smartphone
- 6** Easier to get fares information
- 7** Bus stops closer to home/destination
- 8** Better value for money from bus journeys
- 9** More comfort on buses
- 10** More effort made to tackle anti-social behaviour on buses
- 11** Easier to get onto and off buses
- 12** Buses running earlier/later in the day
- 13** Easier to get info on bus routes and timetables
- 14** Bus companies getting more involved in the local area
- 15** Paying fares by mobile/contactless card
- 16** Drivers showing more consideration to passengers
- 17** Special fares for teenagers
- 18** More technology on board (Wi-Fi and charging)
- 19** Cleaner buses





### Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

### Transport Focus is the independent consumer organisation representing the interests of:

- all users of England's motorways and major 'A' roads (the Strategic Road Network)
- rail passengers in Great Britain
- bus, coach and tram users across England outside London.

### We work to make a difference for all transport users