



# Your Bus Journey

The independent bus user survey

Interim report

September 2023



# Foreword

**With more than three billion local bus passenger journeys in England and Scotland in the last year the ability to travel by bus is a key part of how communities and individuals commute, visit family and friends, shop and get to school. Well over half the journeys taken on public transport are by bus and, as the bus industry seeks ways to encourage more people to use their local bus, our new research is asking passengers what they think of the service.**

Launched in January 2023, the new Your Bus Journey passenger satisfaction survey from Transport Focus is one of the biggest undertaken. Including 34 local transport authority areas and one bus operator in England (outside London) and six regional partnerships in Scotland, the survey aims to speak to passengers about their experience on more than 35,000 journeys by the end of 2023.

This new survey builds on the success of Transport Focus's previous Bus Passenger Survey that ran from 2009 to 2019. It takes a different approach and will continuously collect the experiences of bus passengers in participating areas over an entire year. We've also changed the survey so it's more accessible to passengers. We're asking passengers at both the bus stop and on the bus to participate and there are more ways they can complete the questionnaire.

### **Why do we carry out this survey?**

In short it is to provide a robust, comparable benchmark set of data that can be used by transport authorities, bus operators and governments to identify what really makes a difference to a bus passenger's journey. Our team works closely with these organisations to ensure evidence is turned from data to delivery. In turn, it enables action plans and investment to make a positive impact both today and tomorrow for passengers.

As the new benchmark for bus passenger satisfaction, Your Bus Journey will be able to track and report what bus passengers see and think of the time, effort and investment going in to make buses and bus journeys better in the years ahead.

This report presents a summary of the data that is available to participating areas in England at this mid-way point in the first year. It looks at the interim findings and provides observations on the factors that may be behind the emerging picture of bus passenger satisfaction.

In this interim report we look at overall passenger satisfaction and satisfaction with value for money, the bus stop, waiting times, punctuality, the bus driver and journey times.

In early 2024, after the first year of fieldwork, we will produce a full report and analysis across all participating areas in England and Scotland. We're grateful to all participating authority areas, operators and governments for their investment in and support for this survey.

**David Sidebottom**  
Director

### **Your Bus Journey interim report**



**35**  
areas  
participating  
in the  
survey



**14,000**  
passenger  
journeys  
surveyed  
so far



covering  
**74%**  
of passenger  
journeys across  
England  
(outside London)

This report focuses on the results of over 14,000 responses so far this year in England (outside London). The results from passengers in Scotland (commissioned by Transport Scotland) will be reported separately. The full report for the 2023/2024 phase of the survey will be published in early 2024. It is expected to cover 35,000 responses across England and Scotland.

# Your Bus Journey 2023 interim results



## Overall passenger satisfaction with their bus journey on the day



Overall satisfaction range across all 35 areas from 70 per cent to 94 per cent indicates a clear need for improvement in some areas.



## Waiting time at bus stop



Range in satisfaction between areas is between 57 per cent to 84 per cent. Urban metropolitan areas perform below average at 65 per cent.



## Value for money for fare payers



Range of results across the 35 areas, from 59 per cent to 83 per cent, reflects:

- different ticket costs
- fare initiatives
- performance challenges
- solutions

which are positively - or negatively - impacting passengers.



## Punctuality of the bus at the stop



Range between areas is even wider here - 58 per cent to 89 per cent. Urban metropolitan areas three percentage points below average.



## The bus driver



The range between areas for this measure is much narrower with a high of 93 per cent. Even the poorest performing area scoring a reasonable 81 per cent.

## Bus stop



Range of results across the 35 areas from 65 per cent to 88 per cent. Rural areas have lowest satisfaction at 75 per cent.



## Length of the journey



Range between areas is from 75 per cent to 92 per cent.



# Overall satisfaction

**Overall 80 per cent of passengers say they are either very or fairly satisfied with their bus journey on the day. It's good to see that 44 per cent of the total say they are very satisfied and that only seven per cent are dissatisfied.**

Eight in 10 satisfied passengers is a reasonable result but one most of us will acknowledge is lower than we have seen in the past. Disappointing perhaps but probably not unexpected after a period of post-pandemic disruption with both changing service levels and the impact of industrial action across several bus operations. Importantly this figure now sets the benchmark against which Transport Focus will measure and track progress of overall satisfaction going forward.

Of course, beneath this overall average are differences depending on who the passenger is, where in the country they are and the reason for their journey. Within this large survey we can break down results and explore how satisfaction varies.

We've grouped the different transport authorities into four types of geographical area - **urban metropolitan, urban other, semi-rural and rural**. Satisfaction in urban metropolitan areas, covering six of the combined authority areas in England, is lower than average at 77 per cent. We also looked at the range of overall satisfaction across all 35 areas and found these vary from 70 per cent to 94 per cent indicating a clear need for improvement in some areas.

## How satisfied are different passenger groups?

It is no surprise that free pass holders (84 per cent) are more satisfied than fare-payers (77 per cent). Interestingly looking at the largely fare-paying group of under 60s there is little difference by age, with 16 - 25 year olds marginally less satisfied at 76 per cent than 26 - 59 year olds at 78 per cent. Satisfaction among disabled passengers is similar to the average at 79 per cent.

Satisfaction is lower than average during the peak periods at 76 per cent, and lowest during the afternoon peak (74 per cent), a pattern that is repeated across several of the other headline measures. There could be some underlying reasons for this lower satisfaction including the age of passengers travelling at that time, their reasons for travelling and even whether they have access to a car. Nevertheless, it indicates a particular issue in the afternoon peak that authorities and operators should pay close attention to.

## Overall satisfaction with the journey - range across 35 areas



Base: Individual areas (104 - 949), lowest score (474), highest score (269).

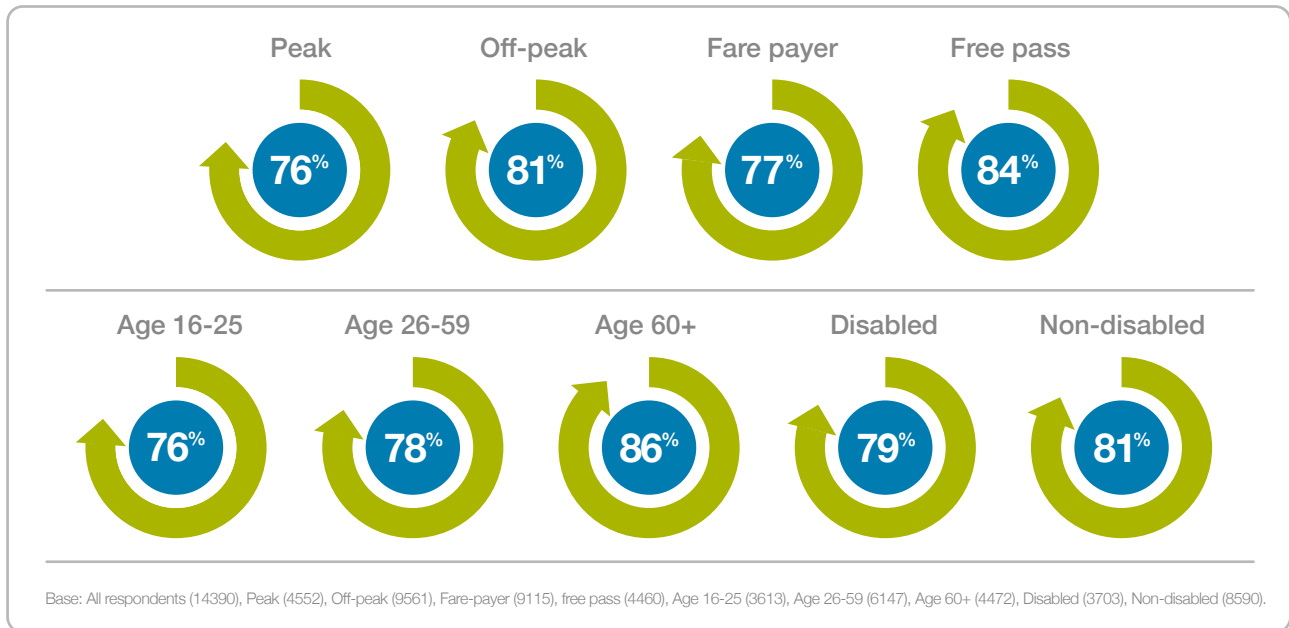
## Overall satisfaction with the journey



- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied

Base: All England areas (14390).

## Overall satisfaction with the journey – a closer look



*“This journey was absolutely amazing. The bus driver and the passengers were very polite. The bus is clean and comfortable, it doesn’t take too long to get to my destination which is why I trust it to go to college. I have been riding this bus for almost a year now and I have always been highly pleased with every little aspect of it, which include its timing, its cleanliness, the safety every passenger has when travelling in the bus and how helpful the driver and the rest of the passengers are.”*



*“Overall journey was good, kept to time and no hold ups. Bus wasn’t too crowded and I had a seat the whole journey.”*

*“It was slightly late and behind schedule but I find with the buses they’re never with the schedule but overall the journey was quick and easy.”*

*“Overall was not a bad journey compared to some journeys, as I’m on the bus all the time, only issue is that it’s dirty and full of rubbish.”*

## Value for money

**Whether passengers feel they get good value for money is determined by a mix of factors including how much they've paid and what the journey is like. How passengers view those factors will vary - a cheap fare for one passenger may be expensive to another, a bus every 30 minutes could be good or bad depending on where you live and where you are going. Perceptions of value are shifting in response to cost of living increases. Whatever value for money means to the individual, we know it is important.**

Among fare payers, 67 per cent are satisfied with value for money including 37 per cent who say they are very satisfied. Lower scores certainly than those for overall satisfaction, generating more dissatisfaction at 16 per cent with room for improvement. But value for money is holding up reasonably well when compared to previous levels or that seen in rail.

The introduction of the £2 single fare cap in many areas has left many passengers feeling they are getting good value for money - with those in rural areas taking longer distance journeys often benefitting the most.

Of course, there are many passengers, such as the 49 per cent in the survey using the bus at least five days a week. These frequent travellers are likely to be using different tickets and passes which may well have

increased in price. The survey reflects this with a notable difference in satisfaction with value for money between those using a single ticket (79 per cent) and those using a weekly/monthly type pass (58 per cent).

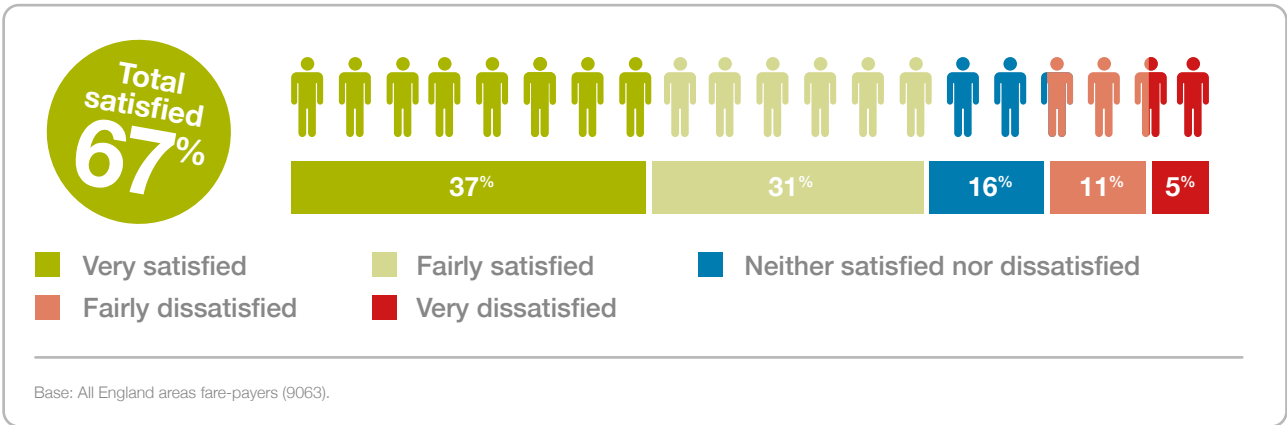
We're seeing a wide range of results across the 35 areas, ranging from 59 per cent to 83 per cent satisfied, reflecting the different ticket costs, fare initiatives and performance challenges and solutions which are positively - or negatively - impacting passengers across the country.

Younger passengers aged 16-25 are the least satisfied with value for money at 63 per cent. Why might this be? This group are often travelling during the peak for critical journeys to work and education and may, like other peak travellers, experience congestion and busier buses. While 16-25 year olds often benefit from fare deals they may also be less affluent and feeling the pinch of cost of living increases. The switch from a child to adult fare could feel steep for some. A lack of alternatives and feeling they have no choice but to use the bus could also be at play here.

The factors that most influence passengers giving a good rating on value for money are the cost per journey for the number of journeys made with your ticket or pass (19 per cent), the cost for the distance travelled (18 per cent), the cost of bus fares now compared to what they were 12 months ago (17 per cent), and the cost of the bus compared to other modes of transport (16 per cent). The cost of bus fares now compared to what they were 12 months ago is, by some margin, the most common reason given for being dissatisfied with value for money (24 per cent).



Satisfaction with value for money among fare-payers



Satisfaction with value for money among fare-payers – range across 35 areas



Base: Individual areas (67 – 639), lowest score (212 – 363), highest score (108).

*“Punctual, efficient and cost-effective transport.”*

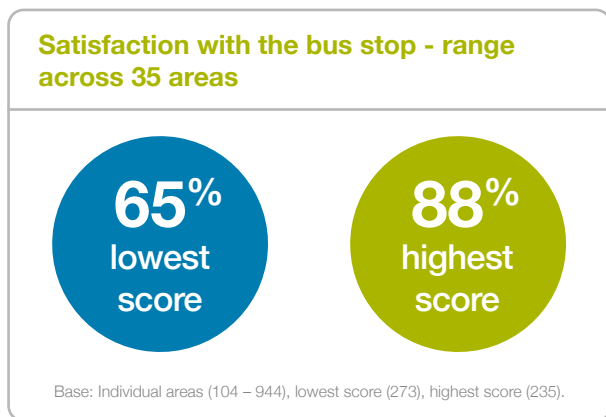
*“Bus service is really good and I am really happy about the current bus fare. My suggestion is that it should be like the way it is. Previously it was too costly.”*



# Key metrics

A wide range of factors contribute to how passengers feel about the overall journey. This survey asks about all those different elements to build a complete picture of passenger satisfaction. Here we focus on some we know are the most important.

## The bus stop

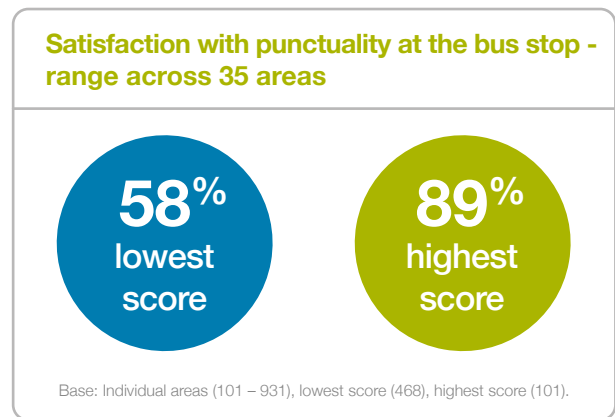


The bus stop or station that a passenger catches the bus from can set the tone for the whole journey. The provision of shelter from the elements, lighting on dark mornings and evenings, a seat to rest on, and information to check and reassure are all part of the mix. The weather and the time of year may influence the way it is viewed and, of course, passengers will have different needs and expectations.

77 per cent of passengers are satisfied with the bus stop, including 43 per cent who are very satisfied. Disabled passengers are less satisfied than average at 75 per cent. Again, we see a wide range of results across the 35 areas, ranging from 65 per cent to 88 per cent with rural areas having the lowest level of satisfaction at 75 per cent.

*“Easy way to get to and from work as both boarding and alighting stops are close to destinations. Seats and shelter to wait for bus to arrive.”*

## Waiting time and punctuality



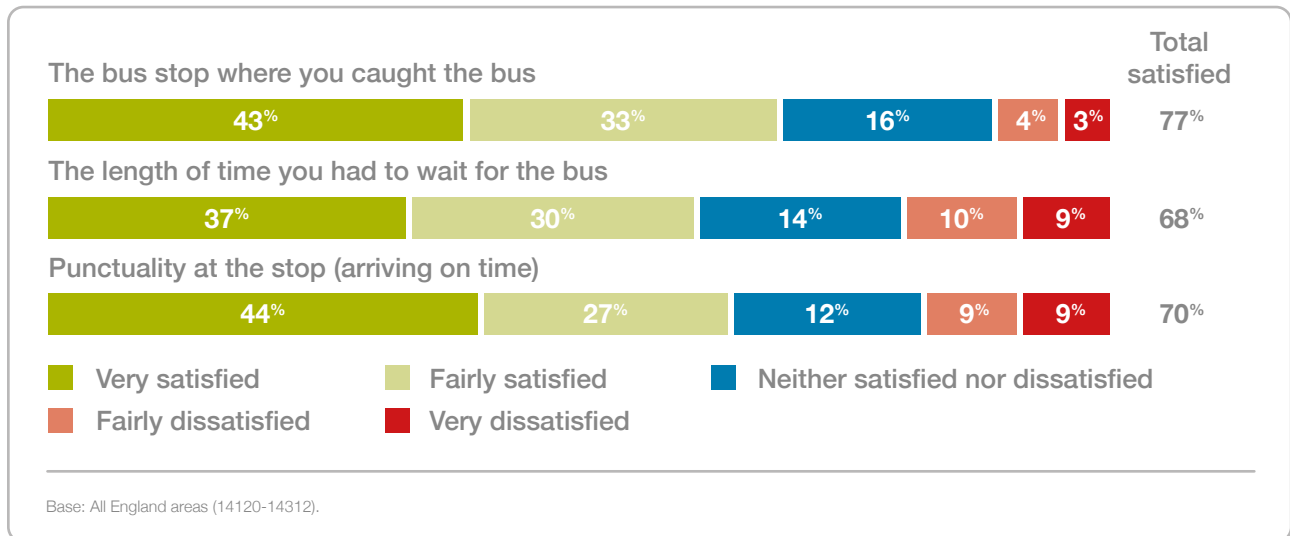
Of course, how long the passenger spends waiting at the bus stop is important. We approach this in two different ways, asking about ‘the length of time you had to wait for the bus’ and ‘the punctuality of the bus at the stop where you caught the bus’, similar but not quite the same.

The time spent waiting at the stop will factor in how often the bus runs and the passenger’s expectation of how long they would have to wait. Punctuality at the stop is probably more closely linked to the timetable and the bus arriving when it is meant to. Access to real-time information plays an important role in reassuring and informing passengers, potentially reducing anxiety and frustration if services are delayed.





## Satisfaction at the bus stop



68 per cent of passengers are satisfied with the length of time they had to wait for the bus, which includes 37 per cent who are very satisfied. We found that 18 per cent of passengers are dissatisfied. Once again, the range in satisfaction between areas is wide - 57 per cent to 84 per cent - and urban metropolitan areas perform below average at 65 per cent.

70 per cent of passengers are satisfied with the punctuality of the bus at the stop, including 44 per cent who are very satisfied. 18 per cent are dissatisfied. Despite the slightly higher satisfaction the range between areas is even wider here - 58 per cent to 89 per cent - and again urban metropolitan areas are three percentage points below average.

*“It arrived on time. Nothing bad, short journey, the waiting time at the second stop was not long.”*

*“If you are lucky the bus turns up and on time or bus turns up but late so you miss the connection bus and if you are unlucky don’t turn up at all.”*

*“Not long to wait for the bus and it got me to my destination fairly quickly.”*

We see a notably worse result in the afternoon peak than in the morning peak on both wait time and punctuality, with satisfaction levels nine and 10 percentage points lower in the afternoon.

Buses running more often and on time are core elements underpinning what passengers want. Transport Focus reinforced this message through our responses to the National Bus Strategy and Enhanced Partnership consultations.

We were pleased to see the focus on measures to improve punctuality and reliability within successful Bus Service Improvement Plan (BSIP) bids. With around seven in 10 passengers satisfied on these two core measures - and in some areas that drops to under six in ten - that focus is clearly needed. Underperforming areas should be looking to accelerate the roll out of their plans and learn from areas that are already seeing success.



## The bus driver

The highest rating of these headline measures goes to the driver of the bus. 85 per cent are satisfied, including 60 per cent who are very satisfied. Only three per cent of passengers are dissatisfied. The range between areas for this measure is much narrower with a high of 93 per cent and even the poorest performing area scoring a reasonable 81 per cent.

We know that the bus driver plays a crucial role in creating a great journey. This is evidenced by the high proportion of passenger comments that cite the driver as the reason they had a good journey (mentioned in 18 per cent of comments, second only to punctuality at 23 per cent).

Positive attributes include a safe, smooth driving style, providing information about fares, destinations and stops, and demonstrating care and courtesy through lowering ramps, hanging on for those racing for the bus and waiting for people to take a seat before pulling off.

However, the majority of comments mention friendliness, a smile, a pleasant greeting - such simple interactions but ones which are greatly valued by passengers. After what has undoubtedly been a challenging period, with industrial action and recruitment issues, it is pleasing to see that the relationship between bus drivers and passengers remains overall, a positive one.

### Satisfaction with the driver of the bus - range across 35 areas

81%  
lowest  
score

93%  
highest  
score

Base: Individual areas (104 – 936), lowest score (462), highest score (232 / 267).

*“Absolutely lovely bus driver.”*

*“Bus driver was exceptionally friendly. Bus clean and very cool just what is needed when it’s hot.”*



## Journey time

81 per cent of passengers are satisfied with the length of time their journey took, including 48 per cent who are very satisfied. Six per cent of passengers are dissatisfied. It's interesting to see that this measure, although closely linked to the all important measure of buses running on time, scores a little better than wait time and punctuality at the stop.

We know through our work with Enhanced Partnerships that many areas are battling with increased road congestion, driver retention and recruitment challenges and, in some cases, vehicle servicing and maintenance issues. These can chip away at reliability and can make matching services to the new travel patterns that many

passengers now need a challenge - all of which can have a negative impact on journey times. It's possible that the slightly higher score for journey time as opposed to the other punctuality measures comes from passengers' different mindset once they are on board the bus. They might feel lower levels of stress and anxiety than during the waiting period and the ability to see any traffic or reasons for delays may help them to accept they are out of the control of the driver.

There are of course many elements within the control of the authority and operator including improvements to bus priority measures and thoughtful timetable design. The comments from the survey reinforce the importance of this with poor punctuality being mentioned the most by passengers who are not satisfied with their journey.

### Satisfaction with journey time - range across 35 areas



Base: Individual areas (104 - 939), lowest score (273), highest score (266).

*"Very quick and efficient. Friendly driver and very helpful when asked for directions after getting off the bus."*

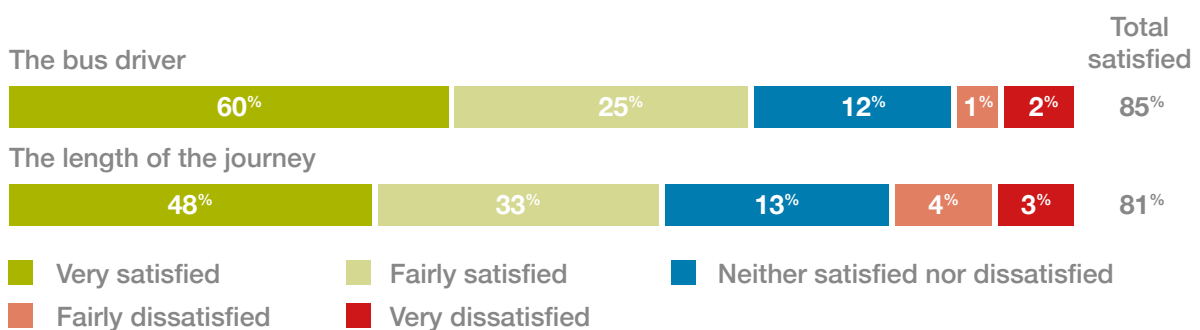
*"The bus arrived on time. Journey didn't take too long. No issues with the journey."*

*"Journey takes too long. A 20-minute drive takes up to an hour or more."*

*"It's good, the journey was short and a good ride."*

*"Too long, too much traffic on the roads."*

## Satisfaction on the bus



Base: All England areas (14201-14207).

## Conclusion

**Midway through the first year of Your Bus Journey we now have a new benchmark for bus passenger satisfaction. This report highlights some of the variations across the country, some encouraging early results but importantly shows where there are challenges that need to be addressed. We will continue to use these results in our work with local authorities and bus operators.**

We know from our other research with bus passengers (*Bus passenger priorities*) that among their top priorities for improvement, they want to see more reliable, punctual, and faster bus journeys as well as better value fares. It is clear from this survey that, while there is good and improving performance across some areas, in others, passengers are still not getting the service they should expect.

It was good to see that the Government backed its investment in these key factors for passengers through the National Bus Strategy and subsequent BSIPs. Enhanced Partnerships are now starting to deliver the better value fares and the journey improvements they've committed to. This survey will allow us to see how passengers respond to these enhancements in the months ahead.

Value for money remains a broad subject. We know it's not just about the cost of the fare - it's more than that. It's about the overall service delivered on the day of the bus journey by the operator and becomes more of a proxy for how passengers feel about the service overall.

Many bus passengers will be sharply feeling the cost of living challenges that currently exist. With that backdrop it feels the emerging picture of value for money results look relatively positive. These scores have no doubt been influenced, where in place, by the introduction of the £2 capped bus fare. We know from our work on this subject (*Awareness and effect of £2 bus fare*) what difference this sort of fare incentive can make for passengers. In addition, we're seeing other innovative deals roll out across areas, for example, through offers for younger people or as part of the 'fares pilot' in Cornwall. We're encouraged that these actions will support positive change for passengers in the coming months.

Deals like this appear to be encouraging more people to give bus a go, maybe for the first time in a long time. That must be a positive change as the industry looks to attract new bus users as well as encouraging existing bus passengers to make more trips.



The bus industry as a whole has faced significant challenges over the past two years in the both the retention and recruitment of drivers. Industrial relations have been strained at times resulting in strike action that impacted on bus passengers' daily lives. Against this backdrop the positive results for satisfaction with the bus driver are good to see. We will work with bus operators and trade bodies to find ways to use this new evidence to reinforce what an important and valued role the driver is for the bus passenger as part of the sector's driver training and recruitment plans.

Transport Focus has welcomed government funding over the past three years to support bus services that provide a vital lifeline to people who absolutely depend on their bus. The nature of this funding has been relatively short-term in its focus. It will be interesting to see how the security of welcomed longer-term government funding until late 2024 will influence bus passenger satisfaction as this survey progresses.

The survey continues across all participating areas through to the end of 2023 at which point we will report on the first full year. It carries on into 2024 and beyond, capturing the experiences of bus passengers so we can measure and use this information to influence improvements.



# Key information about the survey

Urban metropolitan	Urban other	Semi-rural	Rural
<ul style="list-style-type: none"> <li>Greater Manchester</li> <li>Liverpool City Region</li> <li>Tyne and Wear</li> <li>South Yorkshire</li> <li>West Midlands</li> <li>West Yorkshire</li> </ul>	<ul style="list-style-type: none"> <li>Bournemouth, Christchurch and Poole</li> <li>Brighton and Hove</li> <li>City of York</li> <li>Lancashire and Blackburn with Darwen</li> <li>Leicester City</li> <li>Luton</li> <li>North East Lincolnshire</li> <li>Greater Nottingham</li> <li>Portsmouth</li> <li>Reading Buses Network</li> <li>Stoke-on-Trent</li> <li>Surrey</li> <li>Tees Valley</li> <li>Thurrock</li> <li>Warrington</li> <li>West of England and North Somerset</li> <li>West Sussex</li> </ul>	<ul style="list-style-type: none"> <li>Cheshire East</li> <li>Cheshire West and Chester</li> <li>Derbyshire</li> <li>East Sussex</li> <li>Nottinghamshire</li> </ul>	<ul style="list-style-type: none"> <li>Cornwall</li> <li>East Riding of Yorkshire</li> <li>Norfolk</li> <li>Durham</li> <li>Northumberland</li> <li>Oxfordshire</li> <li>Suffolk</li> </ul>





## Measuring actual experiences

Passengers provide their feedback about a single leg of a journey; made on the day we speak to them.

We recruit passengers as they make their journeys, at bus stops and on board buses.

The structured survey questions focus initially on the essential measures of satisfaction - with follow-on detailed questions optional but encouraged.

Passengers are also encouraged to tell us in their own words what was good or bad about the journey and what stood out.

## Fieldwork and data

Passengers complete the survey themselves, using either an online or paper questionnaire. Fieldwork is ongoing, spread evenly across the year to give a full view of bus travel in each area. This interim report covers the first five months of fieldwork (30 January - 18 June). A final report will be available after the first full year of research.

Data has been weighted to be representative of the demographics of passengers by gender and age and journey time banding. It has also been weighted according to whether passengers were approached at bus stops or on board a bus.

Figures are rounded, so may not add up to 100 per cent. For ratings questions, responses are based on those that gave an option (excluding don't know) unless otherwise stated. Peak travel is defined as journeys starting on weekdays between 7.00 - 9.29am and 3.30 - 6.29pm.



## 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:

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

We work to make a difference for all  
transport users.