



Your Bus Journey

The independent bus user survey

2023 results

March 2024



Foreword

More than 1.6 billion passenger journeys were made by bus across England (outside of London) last year. People depend on buses to get them to places of work and education, to important appointments and to give them access to shops and leisure.

The Government's investment in delivering its 'Bus Back Better' National Bus Strategy and £2 bus fare cap investment are designed to make bus services more reliable, frequent and quicker as well as providing better value fares. From our past research these are key areas to improve for existing passengers and to make bus more attractive for potential future bus users.

As a result, political, stakeholder and media interest in the provision of bus services is now at its highest, with increased scrutiny on how bus services are not just maintained but improved across all areas. This means it is vital to understand and articulate the experiences of passengers to inform how and where this investment is targeted and what difference it is making for passengers.

With the rollout of funding, we have seen encouraging increases in passenger numbers in areas such as Cornwall and Norfolk. These examples show that focusing investment and efforts, through effective partnership working, can deliver the things that matter most to passengers, in turn making bus more attractive for non-users. But is that happening everywhere and what do passengers notice on the ground?

Our new survey, Your Bus Journey, enables transport authorities, bus operators and partnerships to monitor targets set in Bus Service Improvement Plans. It also informs existing plans to be adapted including investment and resources to deliver further improvements across key areas. We know that for passengers these improvements should focus on better value fare deals, more reliable journeys, and more frequent services.



We use the survey to benchmark results across areas to help determine how and why passenger experience and satisfaction can vary. We can then identify and share local good practices that have shown that real improvements have been delivered for passengers. This will be a significant area of our work in the years ahead to help Government, authorities and operators do the right things in the right ways for passengers and future users.

Your Bus Journey adds to complementary insight published by Transport Focus including:

- *Motivations and barriers to bus use* - exploring some of the challenges and opportunities the industry faces in attracting and retaining passengers
- *Awareness and effect of £2 bus fare* - understanding how the capped fare has grown patronage and influenced attitudes.

Through our insight we offer support to local transport authorities as they develop their Bus Passenger Improvement Plans. We provide advice to Partnerships on more effective engagement with passengers and how to publish and report against meaningful targets.

We thank all the areas and operators who participated in the survey. Especially those who, as funding partners, ensured we built a robust base for the survey in its first year and have committed to the following year. Their help has been invaluable in establishing Your Bus Journey as the recognised industry measure and evidence base of bus passenger satisfaction.

David Sidebottom
Director
Transport Focus



Headline results



Overall passenger satisfaction with their bus journey on the day



Overall satisfaction range across all 35 areas from 73 per cent to 90 per cent indicates a clear need for improvement in some areas.



Value for money for fare payers



Range of results across the 35 areas, from 55 per cent to 87 per cent, reflects:

- different ticket costs
- fare initiatives
- performance challenges and solutions which are positively - or negatively - impacting passengers.



Waiting time at bus stop



Range in satisfaction between areas is between 60 per cent to 82 per cent. Urban metropolitan areas perform below average at 66 per cent.



Punctuality of the bus at the stop



Range between areas is even wider here - 62 per cent to 86 per cent. Urban metropolitan areas two percentage points below average.



The bus driver



The range between areas for this measure is much narrower with a high of 92 per cent. Even the poorest performing area scores a reasonable 80 per cent.

Bus stop



Range of results across the 35 areas from 69 per cent to 85 per cent. Rural and Urban Metropolitan areas have lowest satisfaction at 75 per cent.



Time the journey took



Range between areas is from 75 per cent to 89 per cent.



Introduction

Launched in January 2023, the *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) the survey has spoken to passengers about their experience on more than 35,000 journeys up until the end of 2023. In addition, the survey covered six regional partnerships in Scotland whose results will be published separately.

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, now continuously collecting the experiences of bus passengers in participating areas throughout the year. We've also changed the survey so it's even 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.

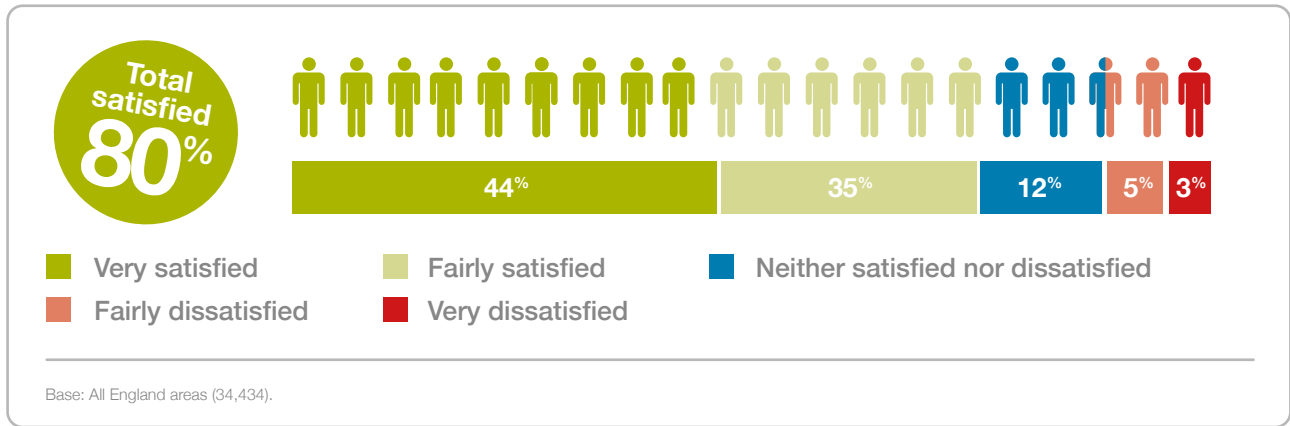
The survey provides a robust, comparable benchmark that can be used by transport authorities, bus operators and governments to identify what really makes a difference to a bus passenger's journey. Our team works closely with these organisations to ensure evidence is turned from data to delivery of improvements. This enables action plans and investment to make a positive impact for passengers.

This report presents a summary of the findings from the first year of the survey across the participating areas and operator networks in England. It provides observations on the factors that affect bus passenger satisfaction, such as value for money, the bus stop, waiting times, punctuality, the bus driver and journey times.



Overall satisfaction

Overall satisfaction with the journey



Overall, 80 per cent of passengers say they are either very or fairly satisfied with their bus journey. At first glance, this is a positive outcome and even more so when you consider that 44 per cent of the total say they are very satisfied and only eight per cent are dissatisfied. Despite this, and although we can't compare directly with previous *Bus Passenger Surveys* due to the change in methodology, some may find this figure disappointing as it has been higher in the past.

We need to acknowledge that many bus services have seen a lot of change in recent years. Disruption during and following the pandemic, bus driver shortages and industrial action in some areas have all had an impact.

On a more positive note, investment in the form of the National Bus Strategy, announced in 2019, and the introduction in most areas of the £2 capped bus fare have improved services for passengers. With the launch of this new survey, it makes sense to draw a line under previous scores and use this data to set a benchmark against which to measure future performance.

When we look more closely at that 80 per cent of passengers who are satisfied, we can see that the underlying picture is more complex. Satisfaction varies considerably between area, type of journey and type of passenger.



Satisfaction varies between areas

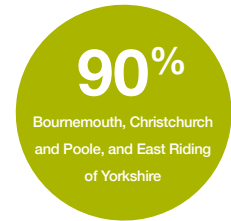
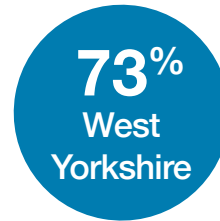
Transport authority areas differ greatly in the challenges that they face in delivering the bus service - as well as the progress they have been able to make so far in implementing the National Bus Strategy. The overall satisfaction score by area ranges from 73 per cent (West Yorkshire) to 90 per cent (Bournemouth, Christchurch and Poole, and East Riding of Yorkshire). This suggests that there is some room for improvement in some areas and there is best practice in others from which we can learn.

We've split areas into four types - urban metropolitan, urban other, semi-rural and rural and satisfaction differs slightly in these too. People in urban metropolitan areas are the least satisfied (78 per cent) compared to those in urban other (82 per cent), semi-rural (81 per cent), and rural (82 per cent).

This is not surprising as urban metropolitan services are the most likely to be affected by crowding, and are most likely to encounter traffic and roadworks, making services run late. Crowding makes people less satisfied, even when they can get a seat. Passengers who sat next to someone they didn't know are significantly less satisfied than those who didn't (71 per cent vs 84 per cent).

However, the differences in satisfaction across type of area are relatively small as services in other areas have challenges too: buses in semi-rural and rural areas are less frequent, the routes can be less convenient, congestion can still be an issue and if a bus doesn't turn up, the wait for the next one can be much longer.

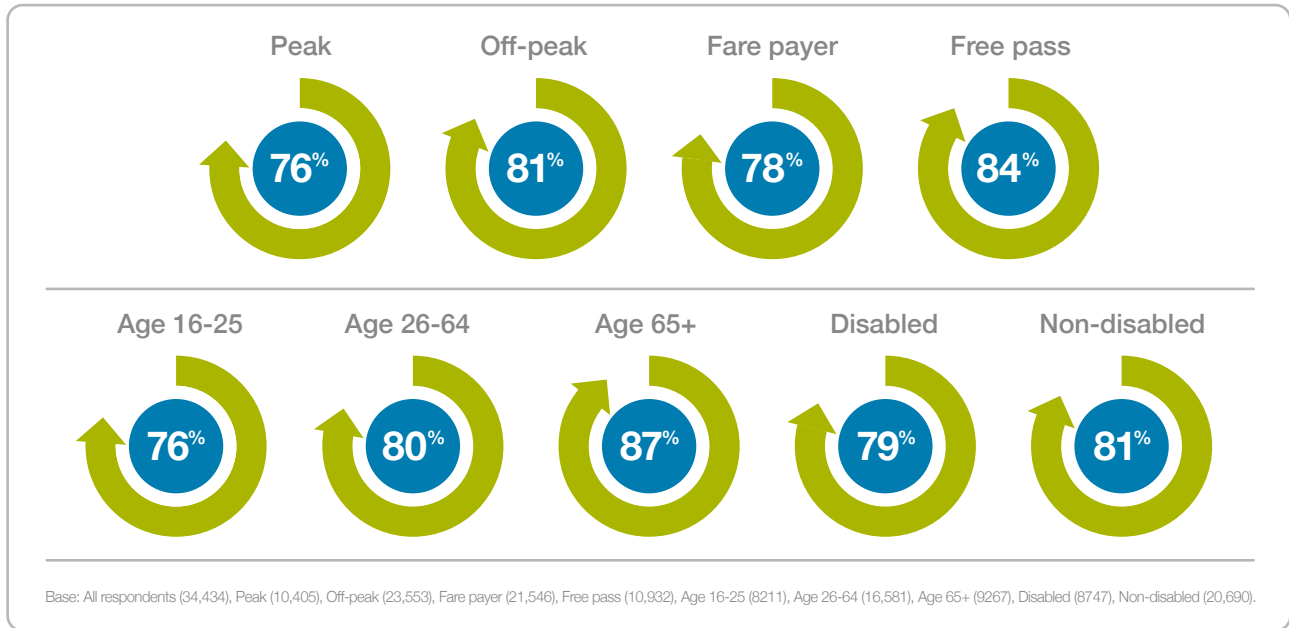
Overall journey satisfaction - range across areas



Base: West Yorkshire (904), Bournemouth, Christchurch and Poole (1196), East Riding of Yorkshire (850).



Overall satisfaction with the journey – a closer look



Peak time travel has challenges

People who travel at peak times are less likely to be satisfied (76 per cent) than those who travel at off-peak times (81 per cent). Someone travelling at peak times is more likely to be commuting to work or college, or attending an appointment, so arriving on time is critical. And the journey is more likely to be a regular occurrence, compounding the frustration if there are frequent issues.

Older passengers are more satisfied

Older passengers (65+) are significantly more likely to be satisfied (87 per cent) than those aged 16-25 (76 per cent) and those aged 26-64 (80 per cent). This is in part because many older people have free passes. Taking age out of the equation and looking simply at whether people have paid for their journey, we find that those who have a free pass are more satisfied (84 per cent) than those who don't (78 per cent).

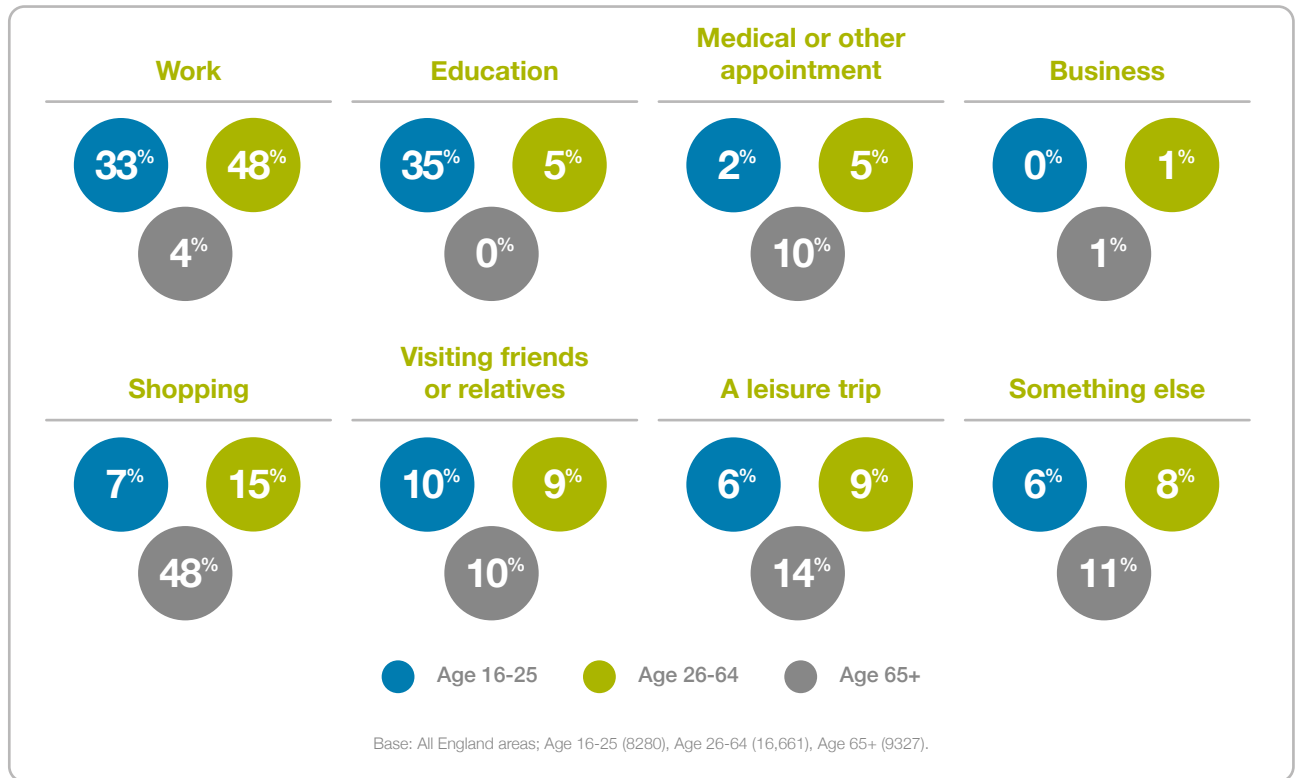
“The bus was 15 minutes late which meant I was late for work. As I am on zero-hour contract I have to deduct this from my timesheet. So basically, I lose out. The same bus was also late yesterday. The 53 Stagecoach bus is a very unreliable service.”



There may be other reasons why older people are more satisfied too. Travelling at quieter times of the day when buses are less crowded and making less time critical journeys is likely to play a role. We will also see later in the report how much the behaviour and demeanour of the bus driver can affect satisfaction. It may be that bus drivers are particularly helpful and kind to older passengers. Younger people are more likely to be travelling to work or college and may be more frustrated when things go wrong.

“I have nothing but praise for drivers on these routes. I have a mobility problem plus vision problem. And the majority of the drivers help me by waiting for me to sit and lowering the step to enable me to board.”

Purpose of the journey - by age



The survey also shows that 51 per cent of 16–25-year-olds took the bus as they had no other options, as compared to 48 per cent of those aged 26-64 and 45 per cent of those aged 65+, increasing the feelings of frustration.

Disabled passengers are less satisfied

People with a disability are also less satisfied (79 per cent) than those without (81 per cent). There are many types of disability, and each can make travelling difficult in a unique way, so it could be argued that we would expect the difference in satisfaction to be bigger. Again, drivers being particularly kind and thoughtful may be helping here.



Ongoing issues

The survey measures overall satisfaction with the individual journey just taken. This is the best way of getting information while it is fresh in the passenger's mind, but if that particular journey is not typical, it may not pick up any dissatisfaction that they might have from a long-term drip-feed of problems and issues.

The survey mitigates this by giving space for passengers to give more detailed feedback and some of the comments give a more detailed picture of what it is like to depend on a route or travel in an area that is consistently underperforming.

“Unfortunately, Thames Travel’s gone hugely downhill over the last 5 yrs. It’s hit ‘n miss if the X40 turns up (or not), tbh. Buses are always late, dirty, cold and the drivers don’t care. After yrs. on the buses I’m actually buying a car next wk. (honestly, just can’t put up with it any longer).”

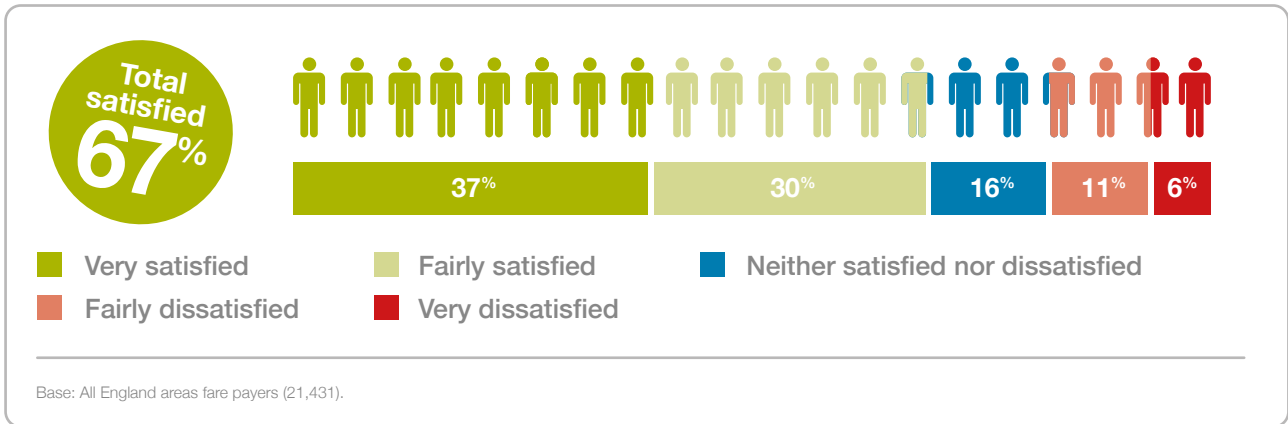
“EYMS regularly cuts services in Pocklington and you can forget about going anywhere on a Sunday with services stopping at 18:00. Absolutely disgraceful... the situation has declined steadily in the last few years. As a regular bus user I sometimes feel frustrated as there is no way to hold companies like EYMS accountable for their poor service.”

“The bus is always late in the morning which makes reaching to work for 7am impossible... Unfortunately don’t not feel that there is anything good about this service at the moment, paying £500 plus for the bus pass and always not being able to reach on time to work is really unacceptable.”



Value for money

How satisfied were you with the value for money of your journey?



If we want to understand how the bus service is performing, we need to ask not only if passengers are satisfied with their journey, but also whether it is good value for money. A passenger’s perception of value for money depends on what they have paid, the experience they have had and their circumstances – what is cheap for one person may be unaffordable for another, especially in these difficult economic times. Overall, 67 per cent of fare payers say they are satisfied with value for money, including 37 per cent who are very satisfied.

This is a positive result, albeit with room for improvement; a further 17 per cent say they are dissatisfied. The introduction of the £2 single fare cap in many areas has left some passengers feeling they are getting good value for money - with those in rural areas taking longer distance journeys often benefiting the most.

But this is not the whole picture. The results differ considerably across the 35 areas, ranging from 55 per cent in Brighton and Hove, and in West of England and North Somerset to 87 per cent in East Riding of Yorkshire. This is a result of different ticket costs, fare initiatives, performance challenges and solutions and passenger expectations which are positively or negatively impacting passengers across the country. Passengers in urban other areas are least satisfied (66 per cent). Whereas passengers in semi-rural areas scored value for money at 73 per cent. This may be driven by the introduction of the £2 capped fare in

some areas where passengers may be judging cost against the distance travelled.

There are also passengers, such as the 47 per cent in the survey, who use the bus at least five days a week, who are likely to be using different tickets and passes which may have increased in price. The survey shows that those using a single ticket are more likely to be satisfied with value for money (77 per cent) than those using a weekly/monthly type pass (58 per cent).

Passengers are most influenced by the cost per distance travelled, cost compared to 12 months ago, cost per journey and quality of the service when rating value for money. Amongst those who are dissatisfied with value for money, the biggest factor is cost compared to 12 months ago.



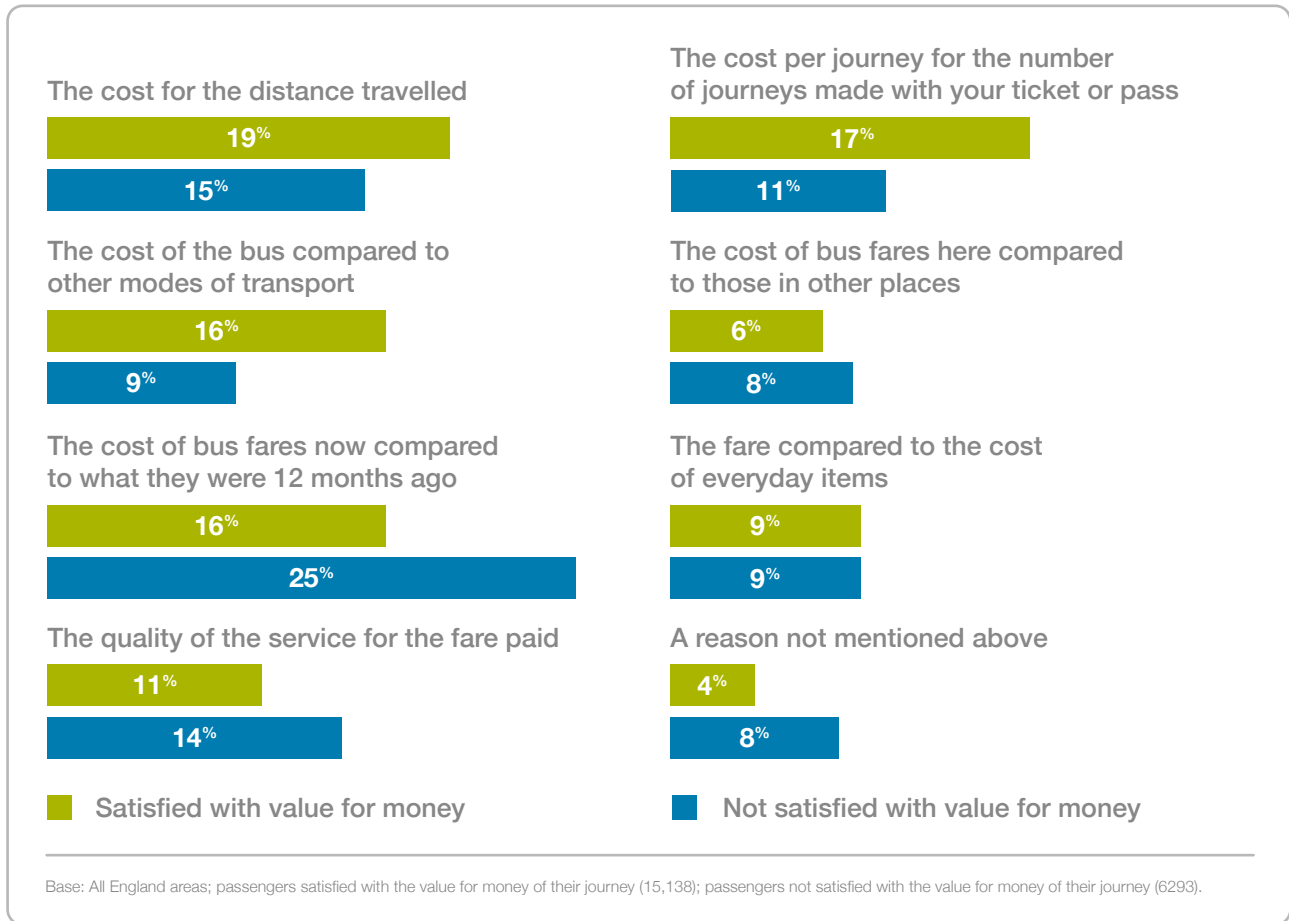
“Great service & the cheap fare really helps. Hopefully it will continue to be £2 for the foreseeable future.”

“...I love the £2 fare & now use the bus rather than the train whenever it's an option.”

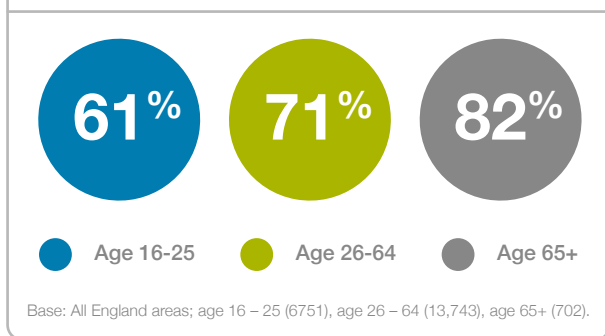
“Even when I passed my test, I still occasionally use the nines, it just works out cheaper with the cost of living rising.”



What had the biggest influence on your rating of the value for money?



Satisfaction with value for money - by age



Passengers travelling at off-peak times are more satisfied with value for money than those travelling at peak times (68 per cent vs 66 per cent) and older passengers who pay a fare are more satisfied than younger passengers.

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. Although 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 child to adult fare could feel steep for some and, as above, they are most likely to have no other travel options.

“I’m not happy with the price of the journey to travel to and from town, the day-saver prices and group tickets as well as student pass, have increased. Due to the cost of living this has made it very difficult for me to travel on a regular basis and use this service like I used too.”

“Journey was fine but it’s expensive”



What contributes to satisfaction?

Key measures

A bus journey has lots of different elements, from starting at the bus stop or station to getting off at the destination, that can each influence how passengers feel. We've looked at some of the most important of these elements in order to understand what contributes to overall satisfaction.

Overall, we can see that satisfaction is highest with the bus driver and lowest with the length of time waiting for the bus. In the sections that follow, we will look at each element in more detail.

"The journey was lovely, so was the driver, I use these buses every day."



"Bus was on time and was clean and warm. Driver was friendly."

"Affordable ticket price, friendly driver."

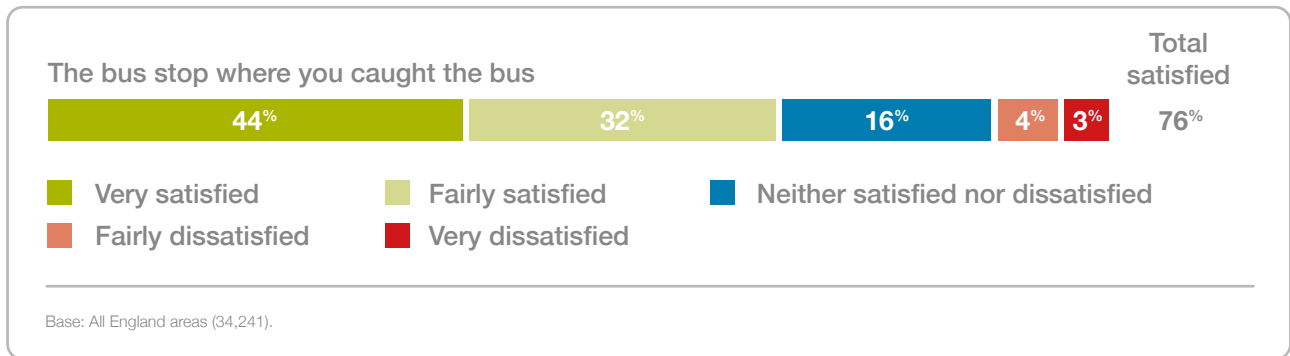
"Only had to wait 4 mins for the bus to arrive. Got a seat easily."

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



The bus stop

The bus stop



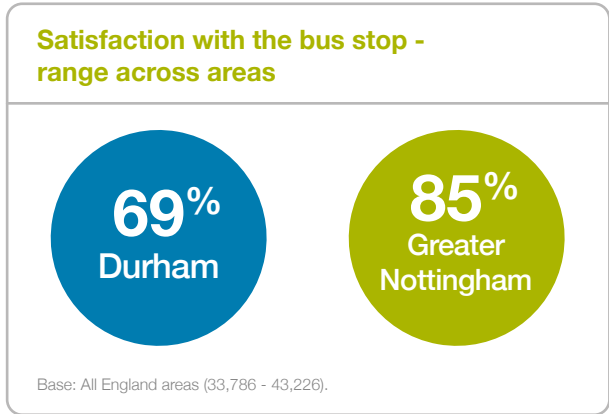
Bus stops vary considerably. Some have seating and shelter; others are simple pole and sign stops. Many have information such as timetables and route maps and some have live bus arrival times. A passenger's experience at the bus stop can set the tone for the whole journey.

A long wait in the rain with no seat or shelter is not only frustrating and unpleasant but can also mean the passenger sitting in wet clothes for the duration of the bus ride. Bus stops and stations can be well lit, busy and feel safe; others can feel dark and isolated at night.

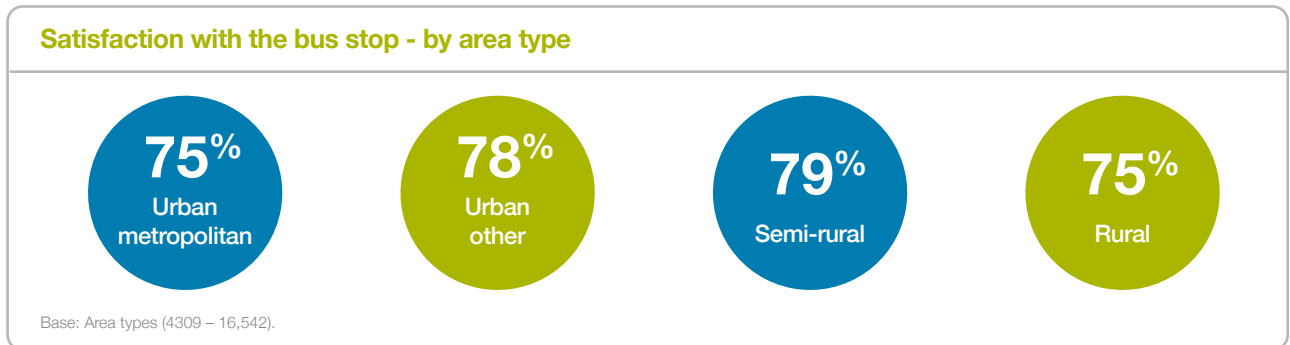
Only 69 per cent said that the general condition and maintenance of the bus stop was good, and only 72 per cent rated the bus stop 'good' for personal safety. This means that around a quarter to a third of passengers find the bus stop lacking.

Overall, 76 per cent of passengers are satisfied with the bus stop, including 44 per cent who are very satisfied, with a further seven per cent who are dissatisfied. By area, satisfaction ranges between 69 and 85 per cent, with passengers in urban metropolitan and rural areas being the least satisfied.

"The bus stop is too dangerous for children, no place to safely stand with running children or with any disability..."

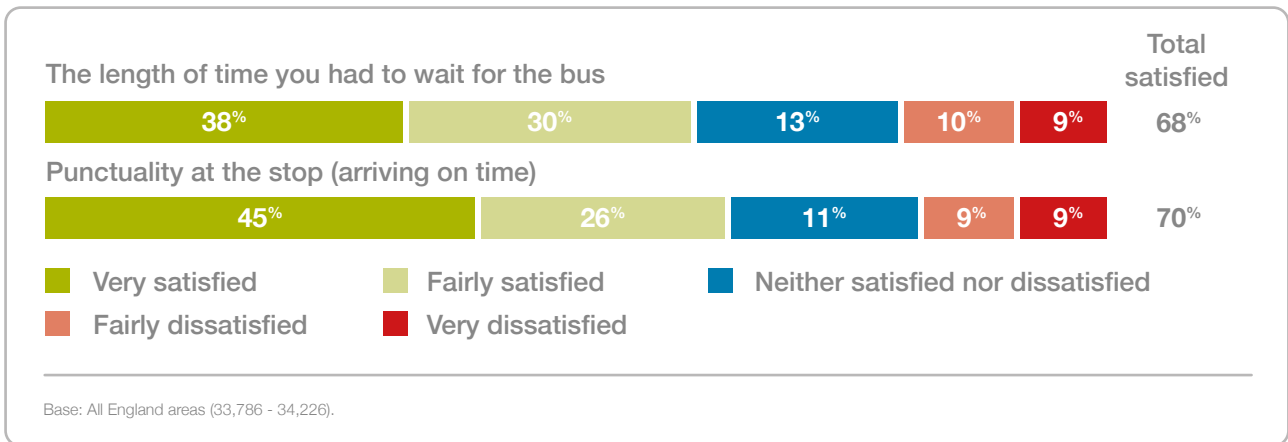


"The bus shelter is no good for sheltering from wind or rain. It is very windy at this spot."



Waiting time and punctuality

Waiting time and punctuality



Overall, 68 per cent of passengers are satisfied with waiting times, which includes 38 per cent very satisfied, with a further 19 percent dissatisfied. A quarter of passengers (27 per cent) reported that they waited less than five minutes for the bus. This varies considerably by area from the highest (52 per cent) to the lowest (20 per cent). For an unfortunate seven per cent, the wait was more than 30 minutes.

Waiting time is a feature not only of the frequency of the service but also of whether those buses are punctual and, when they do arrive, they have capacity. Passengers had complaints about all these factors.

Aside from the issue of insufficient scheduling of buses, the source of dissatisfaction for many isn't that there is a wait for the bus as such. After all, people differ in how early they like to arrive. The problem comes when the wait is longer than expected, as it was for almost a third of people (32 per cent) in the survey.

"The only issue is that the route is poorly timed, as there's only one bus each 30-40 minutes."

"Since the new timetable this route is a joke. 1 bus an hour despite being a hospital route. Always late or full..."

"I and a group of eight other passengers were left stranded in York when the last bus decided to leave early before the scheduled time, it pulled in early (a miracle) it waited then as I and a group of other passengers walked towards the stop it pulled away before the allocated time leaving a bunch of very angry people."

"Bus late as per usual very unreliable at the moment buses are constantly being cancelled it's no fun when am full of arthritis and hanging about for when the next bus is or isn't arriving."

Overall, 70 per cent of passengers are satisfied with the punctuality of the bus, which includes 45 per cent who are very satisfied plus a further 18 per cent who are dissatisfied.

“The bus most of the time is very reliable and on time.”

“The bus was 15 minutes late and I was late for my appointment.”

“It was extremely late. It was late by an hour and thirty minutes.”

“Long wait at the bus stop, 20 mins late arrival.”

Access to real-time information, whether at the bus stop or via an app, can play an important role in reassuring and informing passengers, potentially reducing anxiety and frustration if services are delayed. However, it can be a mixed blessing as passengers perceive that live information isn't always accurate.

“Bus was on time by the app, it wasn't too busy and was quick to get into town from Kimberley.”

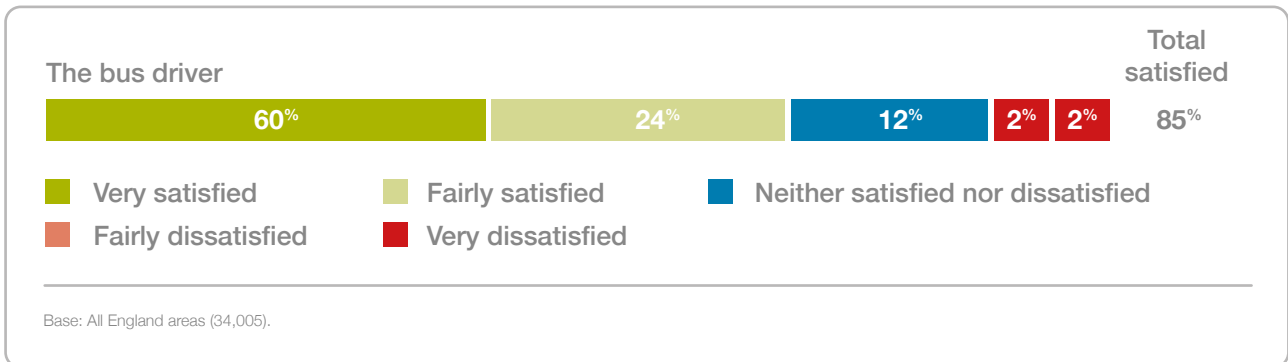
“I waited at the bus stop since 15:30 waiting for the 13 that never showed up and the app had no tracking for it. Had to wait for this bus (14) which was 20 minutes late. Was stood in the cold for 50 minutes at a bus stop with no seating.”

“Bus took a long time to arrive.”



The bus driver

Overall satisfaction with the bus driver



The bus driver can make or break a journey. Overall, satisfaction with bus drivers is high at 85 per cent, including 60 per cent who are very satisfied, and with only three per cent who say they are dissatisfied. Although this does vary across the 35 areas, even the lowest scoring areas still have scores of at least 80 per cent.

Comment after comment references the bus driver's attitude and demeanour – friendly, pleasant, polite or, occasionally, the opposite. More importantly, passengers take note of how safe they feel and how careful the driving. And critically, bus drivers' actions can help passengers with their challenges and even turn a difficult journey into an enjoyable one. Small courtesies such as waiting until someone is seated before moving off, waiting at a stop if someone is hurrying to catch the bus and helping with buggies, walking aids or luggage can make all the difference.

The bus driver is doing a difficult, skilled and responsible job. They not only have to navigate safely through traffic and roadworks and keep the bus on schedule but also consider the comfort and safety of diverse groups of passengers, who may have a variety of needs.

Overall, 82 per cent rate the helpfulness and attitude of the driver as 'good', 82 per cent the time they were allowed to get to their seat after boarding and 77 per cent the smoothness of the ride.



“Very pleasant driver. Gave you time to sit down. Deserves a medal getting the bus through Willaston Village.”

“The journey was very good - the bus driver was kind and the lighting on the bus was dimmed for night time.”

“The driver was kind enough to wait a few seconds extra at one stop for a young couple with a baby in a buggy who would have otherwise missed the bus. Top marks for that.”

“The driver was very helpful with the prams.”

“Driver was polite, patient, very courteous and helpful.”

“Our drivers are always polite and friendly, and this is very important for us older passengers, it’s the best bus company I have ever used.”

“Noisy and bus driver was unpleasant.”

“Bad - the bus driver was very rude.”

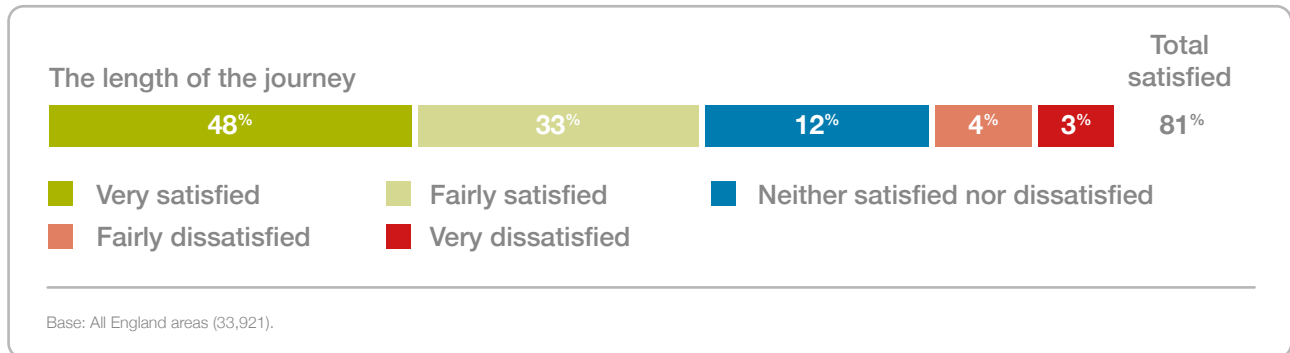


“The driver seemed a little unhappy and looked a bit tired. He was driving in my opinion a bit too fast. Making the passengers quite uncomfortable.”



Journey time

Satisfaction with journey time



In theory, journey time is fixed and should be as it appears on the timetable. However, the reality is different. Most passengers (81 per cent) are satisfied with the length of time their journey took, including 48 per cent who are very satisfied, with a further seven per cent saying they are dissatisfied.

This measure scores better than wait time and punctuality at the stop. This may simply be because passengers have a change of mindset once they are on board the bus, with 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. Overall, 35 per cent of journeys were delayed for one reason or another – primarily congestion (16 per cent). This rises to 41 per cent during peak times, of which congestion is responsible for 22 per cent.

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.

There are some elements which are within the control of the authority and operator including improvements to bus priority measures and thoughtful timetable design. Other elements, such as long-term roadworks, and regular heavy traffic may not be within the control of the authority, but they can be planned for and mitigated by alternative routing and alterations to the

timetables. And there are many factors that are unpredictable and hard to control such as road traffic accidents and bad weather.



“This journey was alright, but I’m a regular traveller and I have observed that sometimes there are delays even when there is no traffic.”

“The first bus 1A was cancelled, the next one was late. So my journey took twice as long.”

“Journey took longer than usual due to Christmas Market and rugby match taking place so high volume of traffic.”

The passenger experience - other factors

Other factors

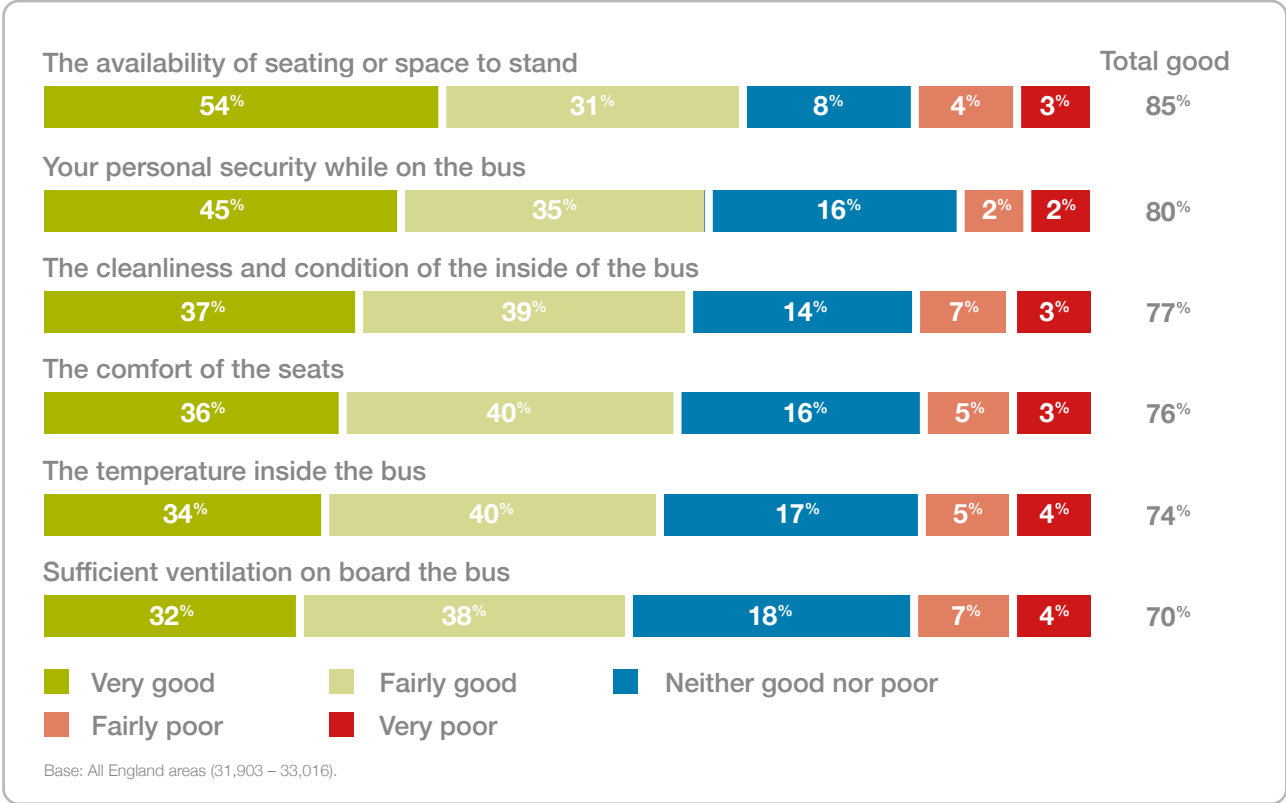
As well as these key measures, there are a range of other factors that contribute to satisfaction with the journey. Factors such as noise, temperature, cleanliness, the behaviour of other passengers and the state of repair of the bus can have a big impact on how passengers feel about their journeys, either positively or negatively. In general, passengers rated these elements highly; comments can give us more insight into the impact that falling short on cleanliness and comfort can have on the journey.



“Very loud kids on board. Had to move seats as people were eating behind me - very annoying. Cold on bus.”

“This bus is clean as it is an electric bus. However many buses are unclean, especially with many passengers often putting their feet on the seats, and as a result very soiled. I avoid sitting on these seats.”

“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 college.”



Bad behaviour from other passengers is relatively rare but when it does happen it can be annoying or even frightening and intimidating. Eight per cent of passengers overall say they felt worried or uncomfortable about other passengers' behaviour on the bus, but this is higher at nine per cent in urban metropolitan areas and among disabled people.

Newer buses can be more comfortable, appear better maintained and offer Wi-Fi and charging points. And electric buses are quieter, which makes for a more pleasant journey. But many areas and routes have older buses that are not yet ready for replacement. In these cases, cleaning and maintenance become even more important.

"The bus had a leak."

"Firstly, I love the extra leg space which gives me great comfort. Secondly, the charging ports are a go-to for me so that my phone battery doesn't run out."

Crowding, as discussed above, is also a factor which may or may not be under the control of the bus operator. However, passengers may perceive that the crowding is due to there being too few buses run, or single-decker buses instead of double deckers.

"This bus route was supposed to be increased in frequency when you stopped 46 bus route. This has not happened. I waited 35 minutes for the bus. And this is regular thing. Bus packed. Buses used on No 5 route during working week are old, smelly, grubby, dirty, unclean. It is not a pleasant experience."

And finally, sometimes it's the little things that can make a journey particularly enjoyable.

"It was warm inside which is good. Also, I liked the Christmas jumper on the bus driver."



Conclusions

Your Bus Journey has established a new benchmark for bus passenger satisfaction. The survey highlights variations across the country. The area results demonstrate good and, in some cases, improving performance over the year. However, importantly, the survey also shows there are challenges and that many passengers are still not getting the service they expect. This is evidenced in the range of results across the survey on key factors such as overall satisfaction with the journey, value for money and punctuality.

This variation with passenger experience cannot be accounted for by the type of area in which the transport authority operates. The differences are significant – ranging from a difference of 17 per cent between the highest and lowest performing areas for overall satisfaction, to a difference of 32 per cent for value for money.

These variations are far greater than the difference between transport authority type (seven per cent difference on overall satisfaction between urban metropolitan and semi-rural areas). This suggests that there is significant scope to improve bus services for current users and help attract new passengers.

These results also reaffirm the findings from previous Transport Focus research about the importance to passengers of waiting times, punctuality, journey times, value for money and the bus driver.

Waiting time, punctuality and journey time

There is significant variation in scores across the survey by area, and even in better scoring areas, congestion in the peak travel periods is a challenge for operators and reflected in the scores given by passengers. There are often sensitive local political issues around allocation and management of road space (bus priority measures for example) that enable buses to provide a quicker and more reliable journey time for passengers, in turn building the foundation for delivering satisfactory journeys for passengers and helping build trust more generally in local bus services.

Value for money

Value for money is a complex subject, and passenger feedback on this matter involves more than just the cost of the fare. Value for money can be seen as a

proxy for how passengers feel about the service they experience on the day. We feel the overall ratings for value for money have held up well when set against the current cost-of-living crisis impacting many passengers. The scores appear to have been positively influenced by the introduction of the £2 capped bus fare, where the offer is in place.

We're also seeing other innovative deals roll out across areas, for example, through offers targeted at younger people, group travel and multi-operator deals.

The bus driver

The bus industry has faced many challenges over the past three years, including, for example, the retention and recruitment of drivers and, in some areas, industrial relations resulting in strike action. These factors have impacted passengers too, with services, in many areas, struggling to provide the reliability that people depend on in their daily lives.

Against this backdrop the positive overall results for satisfaction with the bus driver are good to see. The bus driver plays a key role in ensuring that passengers have a good journey. Where passengers say they have had a great journey it is often because of a positive interaction with the driver.



Improving bus services - what needs to happen next

Bus services provide access for people to places of work, education, shopping and vital appointments. Therefore, the bus is more than just another mode of transport. A good bus service also provides wider economic and social benefits for local communities, businesses and public services. This is recognised through the investment and political interest in making buses better in recent years. We recognise that there is a role for those beyond the transport sector to take note of these results and our recommendations.

We will use these results in our work with Government, local authorities and bus operators to press for improvements and highlight good practices where, at local levels, investment and delivery in improvements have been effectively targeted, all evidenced through passenger satisfaction results in the survey.

For transport authorities and bus operators (Partnerships and franchise areas):

Each transport authority should consider their detailed results and how they will use these to:

- drive improvements in passenger satisfaction on the services they currently operate
- plan service improvements and new initiatives to address feedback in the survey
- work with local elected representatives, public services, passenger groups and businesses to build support for the necessary improvements in a way that best addresses local needs.



For Government, the wider public sector and the bus industry:

- The Bus Centre of Excellence and Confederation of Passenger Transport should use these results to provide support and guidance on best practice for transport authorities and operators; we will work with them to do this
- Department for Transport and Traffic Commissioners should consider how they can better support transport authorities and bus operators to drive improvements in customer experience
- We will work with the Department for Transport to inform their evaluation and monitoring programme about where additional funding has had an impact on customers and how this can most effectively be targeted in future
- Confederation of Passenger Transport and operators should consider how these results can be used to encourage new drivers into the industry by promoting the positive feedback from passengers.



For elected representatives

- We will be sharing the relevant results for their areas with Councillors and MPs, so they can be used to challenge and support the way bus services are planned and delivered, particularly where difficult decisions need to be made about competing priorities.

For Transport Focus

- We will undertake further analysis and research into these results to understand the factors that contribute to higher performance. For example, the extent to which value for money scores can be accounted for by the £2 fare and other ticketing initiatives.

- We will be providing case studies and sharing what works from the highest performing areas during 2024. We would welcome feedback on where these will be of most benefit and expect them to include:
 - Examples of high performing authorities in rural and urban areas
 - Examples of authorities that have achieved particularly high scores for value for money and reliability.
 - Examples of authorities that have achieved greater parity between satisfaction scores for disabled and non-disabled passengers, particularly on ratings for the bus stop, value for money and personal safety
- Our 2024 results will track changes in passenger satisfaction, identify any trends, and link these to BSIP funding, interventions from transport authorities and bus operators, and other relevant factors. We will report on these in 2025.



Area league tables

Overall journey satisfaction by area

Rank	Area	Satisfied	Area type
1	East Riding of Yorkshire	90%	Rural
2	Bournemouth, Christchurch and Poole	90%	Urban other
3	Greater Nottingham	87%	Urban other
4	Stoke-on-Trent	85%	Urban other
5	Nottinghamshire	85%	Semi-rural
6	Suffolk	85%	Rural
7	Cornwall	85%	Rural
8	Thurrock	84%	Urban other
9	City of York	84%	Urban other
10	Derbyshire	83%	Semi-rural
11	Northumberland	83%	Rural
12	Portsmouth	83%	Urban other
13	Tyne & Wear	83%	Urban metropolitan
14	Cheshire East	83%	Semi-rural
15	Liverpool City Region	83%	Urban metropolitan
16	North East Lincolnshire	83%	Urban other
17	Surrey	83%	Urban other
18	Leicester City	82%	Urban other
19	Brighton and Hove	82%	Urban other
20	Cheshire West & Chester	81%	Semi-rural
21	Norfolk	81%	Rural
22	West Sussex	81%	Urban other
23	South Yorkshire	81%	Urban metropolitan
24	Lancashire and Blackburn with Darwen	80%	Urban other
25	Luton	80%	Urban other
26	East Sussex	79%	Semi-rural
27	Greater Manchester	79%	Urban metropolitan
28	Oxfordshire	78%	Rural
29	West of England and North Somerset	77%	Urban other
30	Warrington	76%	Urban other
31	Tees Valley	76%	Urban other
32	West Midlands	76%	Urban metropolitan
33	Durham	75%	Rural
34	West Yorkshire	73%	Urban metropolitan

Base: individual areas (464 – 1908).

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

Satisfaction with value for money by area

Rank	Area	Satisfied	Area type
1	East Riding of Yorkshire	87%	Rural
2	Stoke-on-Trent	80%	Urban other
3	Cheshire East	79%	Semi-rural
4	Derbyshire	79%	Semi-rural
5	Northumberland	75%	Rural
6	Cornwall	75%	Rural
7	West Sussex	75%	Urban other
8	Warrington	75%	Urban other
9	Liverpool City Region	75%	Urban metropolitan
10	Durham	74%	Rural
11	Greater Nottingham	74%	Urban other
12	Suffolk	73%	Rural
13	Tees Valley	73%	Urban other
14	Cheshire West & Chester	73%	Semi-rural
15	Tyne & Wear	72%	Urban metropolitan
16	Greater Manchester	72%	Urban metropolitan
17	Nottinghamshire	71%	Semi-rural
18	Luton	71%	Urban other
19	North East Lincolnshire	70%	Urban other
20	Lancashire and Blackburn with Darwen	69%	Urban other
21	Bournemouth, Christchurch and Poole	69%	Semi-rural
22	West Yorkshire	69%	Urban metropolitan
23	Leicester City	68%	Urban other
24	East Sussex	68%	Semi-rural
25	Norfolk	67%	Rural
26	South Yorkshire	67%	Urban metropolitan
27	Portsmouth	66%	Urban other
28	Surrey	66%	Urban other
29	City of York	66%	Urban other
30	Thurrock	64%	Urban other
31	Oxfordshire	63%	Rural
32	West Midlands	58%	Urban metropolitan
33	Brighton and Hove	55%	Urban other
34	West of England and North Somerset	55%	Urban other

Base: individual areas (308 – 1310).

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

Satisfaction with waiting time by area

Rank	Area	Satisfied	Area type
1	Greater Nottingham	82%	Urban other
2	Bournemouth, Christchurch and Poole	81%	Urban other
3	East Riding of Yorkshire	79%	Rural
4	Stoke-on-Trent	75%	Urban other
5	Nottinghamshire	74%	Semi-rural
6	Norfolk	74%	Rural
7	Portsmouth	74%	Urban other
8	Tyne & Wear	74%	Urban metropolitan
9	Derbyshire	74%	Semi-rural
10	Suffolk	73%	Rural
11	Leicester City	73%	Urban other
12	Thurrock	72%	Urban other
13	Cheshire East	72%	Semi-rural
14	City of York	72%	Urban other
15	North East Lincolnshire	72%	Urban other
16	Cornwall	71%	Rural
17	Brighton and Hove	71%	Urban other
18	Liverpool City Region	71%	Urban metropolitan
19	Cheshire West & Chester	69%	Semi-rural
20	Surrey	69%	Urban other
21	Lancashire and Blackburn with Darwen	68%	Urban other
22	Northumberland	68%	Rural
23	Greater Manchester	67%	Urban metropolitan
24	Oxfordshire	67%	Rural
25	Warrington	66%	Urban other
26	East Sussex	66%	Semi-rural
27	South Yorkshire	65%	Urban metropolitan
28	West Sussex	65%	Urban other
29	Luton	65%	Urban other
30	West of England and North Somerset	64%	Urban other
31	West Midlands	63%	Urban metropolitan
32	West Yorkshire	61%	Urban metropolitan
33	Durham	60%	Rural
34	Tees Valley	60%	Urban other

Base: individual areas (463 – 1896).

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

Operator league tables

Overall journey satisfaction by operator

Rank	Operator Name*	Satisfied	Operating Group
1	Stagecoach in Portsmouth	91%	Stagecoach
2	morebus	90%	Go-Ahead
3	Nottingham City Transport	89%	Non-major group
4	East Yorkshire	88%	Go-Ahead
5	CentreBus	88%	Non-major group
6	trentbarton	87%	Wellglade
7	Ensign Bus	87%	First
8	D & G Bus	87%	Non-major group
9	Ipswich Buses	87%	Non-major group
10	First in Leicester City	86%	First
11	Stagecoach in Tyne & Wear	86%	Stagecoach
12	Transdev	86%	Transdev
13	Go Cornwall	86%	Go-Ahead
14	Reading Buses	86%	Non-major group
15	Stagecoach in Greater Manchester	85%	Stagecoach
16	First in Suffolk	84%	First
17	First in York	84%	First
18	Stagecoach in Cheshire West & Chester	83%	Stagecoach
19	Stagecoach in North East Lincolnshire	83%	Stagecoach
20	Arriva in Liverpool City Region	83%	Arriva
21	First Kernow	83%	First
22	Metrobus	83%	Go-Ahead
23	First in South Yorkshire	83%	First
24	First in Stoke-on-Trent	82%	First
25	Stagecoach in Liverpool City Region	82%	Stagecoach
26	Go North East	82%	Go-Ahead
27	Arriva in Warrington	82%	Arriva
28	Brighton & Hove Bus	82%	Go-Ahead
29	Arriva in Cheshire West & Chester	80%	Arriva
30	Arriva in Northumberland	80%	Arriva
31	First in Norfolk	80%	First
32	First in Portsmouth	80%	First
33	Stagecoach in South Yorkshire	80%	Stagecoach
34	Arriva in Cheshire East	80%	Arriva
35	Stagecoach in Lancashire & Blackburn with Darwen	79%	Stagecoach
36	Arriva in Luton	79%	Arriva
37	Stagecoach in Surrey	79%	Stagecoach
38	Oxford Bus Company	79%	Go-Ahead
39	Stagecoach in Nottinghamshire	78%	Stagecoach
40	Arriva in Leicester City	77%	Arriva
41	Stagecoach in West Sussex	77%	Stagecoach
42	Stagecoach in Oxfordshire	77%	Stagecoach
43	Stagecoach in Tees Valley	77%	Stagecoach
44	Stagecoach in Derbyshire	76%	Stagecoach
45	Warrington's Own Buses	76%	Non-major group
46	First in West of England and North Somerset	76%	First
47	National Express	76%	National Express
48	Stagecoach in East Sussex	75%	Stagecoach
49	Arriva in Tees Valley	75%	Arriva
50	Preston Bus	73%	Rotala
51	First in West Yorkshire	72%	First
52	Arriva in County Durham	70%	Arriva
53	Go North West	70%	Go-Ahead
54	Diamond Bus in Greater Manchester	69%	Rotala
55	Arriva in West Yorkshire	66%	Arriva

Base: individual operators (154 – 1477).

* for larger operating groups this is within an area.

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

Satisfaction with value for money by operator

Rank	Operator Name*	Satisfied	Operating Group
1	East Yorkshire	85%	Go-Ahead
2	Stagecoach in West Sussex	85%	Stagecoach
3	D & G Bus	84%	Non-major group
4	Arriva in Warrington	83%	Arriva
5	Go Cornwall	83%	Go-Ahead
6	CentreBus	83%	Non-major group
7	Transdev	82%	Transdev
8	trentbarton	80%	Wellglade
9	Stagecoach in Liverpool City Region	80%	Stagecoach
10	Stagecoach in Tyne & Wear	79%	Stagecoach
11	First in Stoke-on-Trent	78%	First
12	Go North West	77%	Go-Ahead
13	Stagecoach in Portsmouth	75%	Stagecoach
14	Arriva in Northumberland	74%	Arriva
15	First in Suffolk	73%	First
16	Warrington's Own Buses	73%	Non-major group
17	Arriva in County Durham	73%	Arriva
18	Stagecoach in Derbyshire	73%	Stagecoach
19	Nottingham City Transport	73%	Non-major group
20	Arriva in Liverpool City Region	73%	Arriva
21	Arriva in Tees Valley	72%	Arriva
22	Arriva in Cheshire East**	72%	Arriva
23	First Kernow	72%	First
24	Stagecoach in Tees Valley	72%	Stagecoach
25	Ipswich Buses	72%	Non-major group
26	Stagecoach in Cheshire West & Chester	71%	Stagecoach
27	Stagecoach in South Yorkshire	71%	Stagecoach
28	Stagecoach in Surrey	70%	Stagecoach
29	Stagecoach in North East Lincolnshire	70%	Stagecoach
30	Arriva in Cheshire West & Chester	70%	Arriva
31	Go North East	69%	Go-Ahead
32	morebus	69%	Go-Ahead
33	Stagecoach in Lancashire & Blackburn with Darwen	68%	Stagecoach
34	Stagecoach in Nottinghamshire	68%	Stagecoach
35	Arriva in Luton	68%	Arriva
36	First in West Yorkshire	68%	First
37	Reading Buses	68%	Non-major group
38	Diamond Bus in Greater Manchester**	68%	Rotala
39	Stagecoach in Greater Manchester	68%	Stagecoach
40	Metrobus	67%	Go-Ahead
41	Arriva in Leicester City	66%	Arriva
42	Stagecoach in East Sussex	66%	Stagecoach
43	First in Leicester City	65%	First
44	First in Norfolk	65%	First
45	Arriva in West Yorkshire	65%	Arriva
46	First in York	64%	First
47	Oxford Bus Company	64%	Go-Ahead
48	First in Portsmouth	63%	First
49	Stagecoach in Oxfordshire	63%	Stagecoach
50	Ensign Bus	62%	First
51	First in South Yorkshire	61%	First
52	National Express	57%	National Express
53	Brighton & Hove Bus	54%	Go-Ahead
54	First in West of England and North Somerset	54%	First
55	Preston Bus	48%	Rotala

Base: individual operators (90 – 994).

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

* for larger operating groups this is within an area.

** indicates base sizes between 75-99.

Satisfaction with bus driver overall by operator

Rank	Operator Name*	Satisfied	Operating Group
1	trentbarton	93%	Wellglade
2	morebus	91%	Go-Ahead
3	Go Cornwall	91%	Go-Ahead
4	Stagecoach in Portsmouth	91%	Stagecoach
5	Stagecoach in Tyne & Wear	90%	Stagecoach
6	East Yorkshire	90%	Go-Ahead
7	First Kernow	90%	First
8	Nottingham City Transport	90%	Non-major group
9	Reading Buses	89%	Non-major group
10	Transdev	89%	Transdev
11	Stagecoach in Lancashire & Blackburn with Darwen	89%	Stagecoach
12	Stagecoach in Liverpool City Region	88%	Stagecoach
13	First in South Yorkshire	88%	First
14	Ipswich Buses	88%	Non-major group
15	Stagecoach in Cheshire West & Chester	88%	Stagecoach
16	First in Leicester City	87%	First
17	Oxford Bus Company	87%	Go-Ahead
18	Stagecoach in Oxfordshire	87%	Stagecoach
19	Stagecoach in Surrey	87%	Stagecoach
20	First in York	87%	First
21	Stagecoach in North East Lincolnshire	87%	Stagecoach
22	Arriva in Cheshire West & Chester	87%	Arriva
23	Stagecoach in Tees Valley	87%	Stagecoach
24	Metrobus	87%	Go-Ahead
25	D & G Bus	87%	Non-major group
26	Go North East	86%	Go-Ahead
27	Brighton & Hove Bus	86%	Go-Ahead
28	Ensign Bus	86%	First
29	Warrington's Own Buses	85%	Non-major group
30	Stagecoach in East Sussex	85%	Stagecoach
31	First in Stoke-on-Trent	85%	First
32	Stagecoach in South Yorkshire	85%	Stagecoach
33	Arriva in Northumberland	85%	Arriva
34	Arriva in Luton	85%	Arriva
35	Stagecoach in Derbyshire	85%	Stagecoach
36	Stagecoach in Greater Manchester	85%	Stagecoach
37	CentreBus	84%	Non-major group
38	First in Suffolk	84%	First
39	First in Portsmouth	84%	First
40	Arriva in Cheshire East	84%	Arriva
41	Arriva in Liverpool City Region	84%	Arriva
42	First in West Yorkshire	84%	First
43	Arriva in County Durham	84%	Arriva
44	Stagecoach in Nottinghamshire	84%	Stagecoach
45	First in Norfolk	84%	First
46	Arriva in Warrington	84%	Arriva
47	Stagecoach in West Sussex	83%	Stagecoach
48	Arriva in Tees Valley	83%	Arriva
49	First in West of England and North Somerset	83%	First
50	National Express	81%	National Express
51	Arriva in Leicester City	80%	Arriva
52	Preston Bus	80%	Rotala
53	Arriva in West Yorkshire	78%	Arriva
54	Go North West	76%	Go-Ahead
55	Diamond Bus in Greater Manchester	74%	Rotala

Base: individual operators (150 – 1463).

* for larger operating groups this is within an area.

Rankings are based on 'total satisfied'. Where two or more areas or operators score the same, we rank first by 'very satisfied' then by lowest 'dissatisfied'.

Key information about the survey

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

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 final report covers the first full year of fieldwork (30 January - 28 December 2023).

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.

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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.