



# Your Bus Journey 2023 survey results

13 March 2024





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Tobyn Hughes - Managing Director, Transport North East





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Simon Lightwood MP, Shadow Minister for Local Transport



# Key findings from 2023



13 March 2023

# About Your Bus Journey



Passengers feed back about a **single leg of a journey, made on day of recruitment**



**Online** as main method for survey completion – but paper questionnaires available too



**Pro-active recruitment of passengers, at point of usage**



**Questionnaire focusing initially on essential metrics** – with follow-on more detailed questions optional, but encouraged



.... meaning **face to face** interception as passengers make journeys (on board and at stops) – verified and inclusive



**Structured questions** about overall journey experience, with core measures carried over from previous Bus Passenger Survey.

# Areas covered in the 2023 survey (England)

## Urban metropolitan

Greater Manchester  
Liverpool City Region  
Tyne & Wear  
South Yorkshire  
West Midlands  
West Yorkshire

## Urban other

Bournemouth, Christchurch & 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

## Urban other (cont.d)

Tees Valley  
Thurrock  
Warrington  
West of England and North  
Somerset  
West Sussex  
  
**Semi-rural**  
Cheshire East  
Cheshire West & Chester  
Derbyshire  
East Sussex  
Nottinghamshire

## Rural

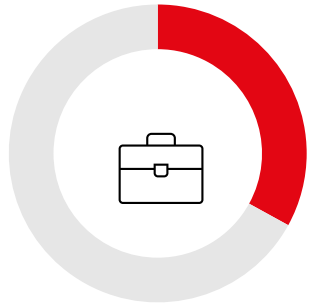
Cornwall  
East Riding of Yorkshire  
Norfolk  
Durham  
Northumberland  
Oxfordshire  
Suffolk

# About the journeys





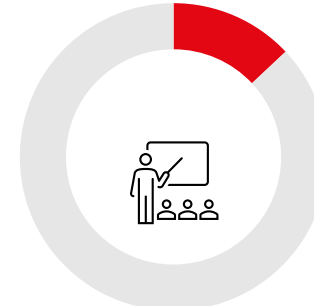
# Commuting and shopping are the main journey purposes



Commuting for work  
**33%**



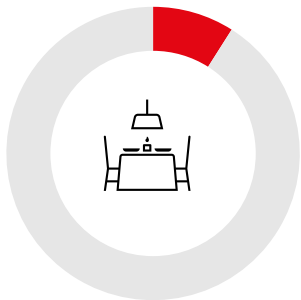
Shopping  
**20%**



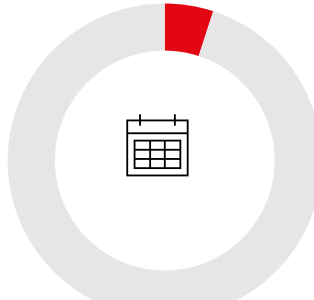
Commuting for education  
**13%**



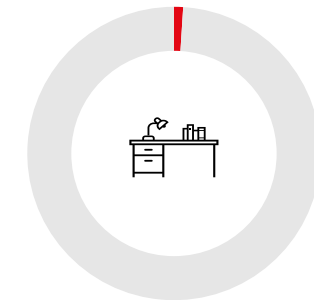
Friends or relatives  
**10%**



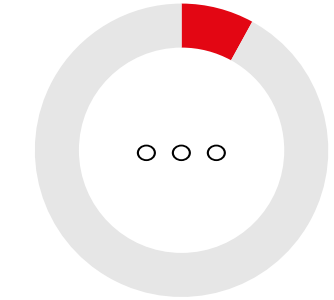
Leisure  
**9%**



Appointment  
**5%**



Business  
**1%**



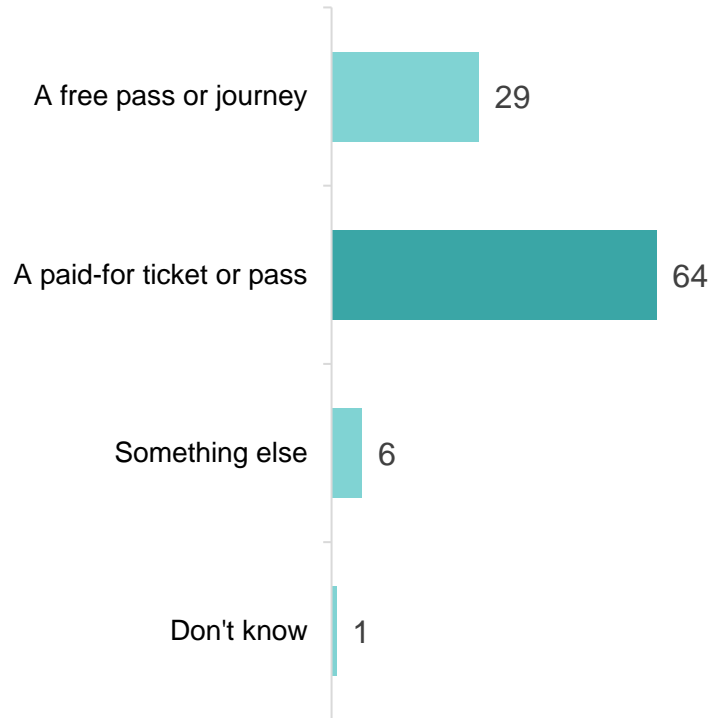
Other  
**8%**

Q5 What was the main purpose of this bus journey?  
Base: All England areas 35044

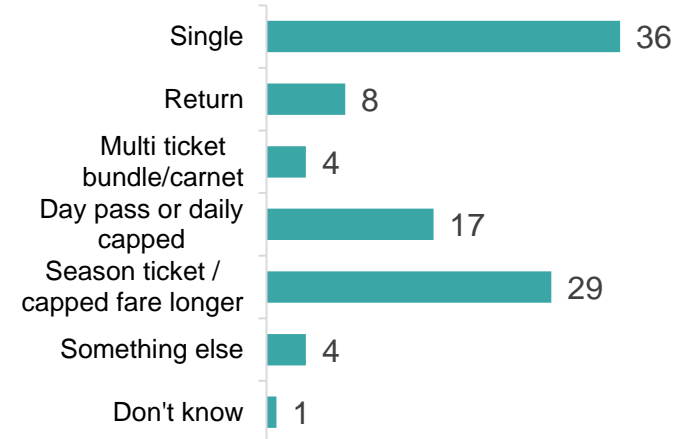


# Almost two thirds of passengers are fare payers and they are mostly buying singles, day passes or period passes

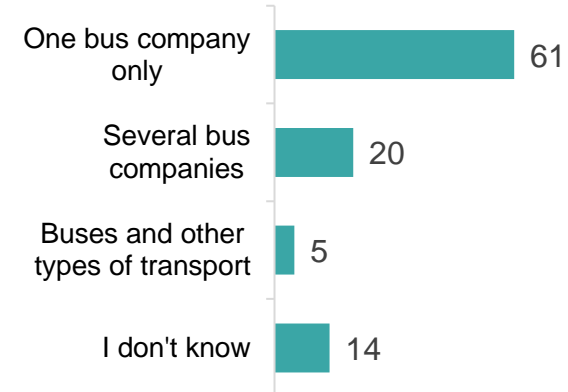
Type of ticket/ pass (%)



Pass/ticket used (paid journey only) (%)



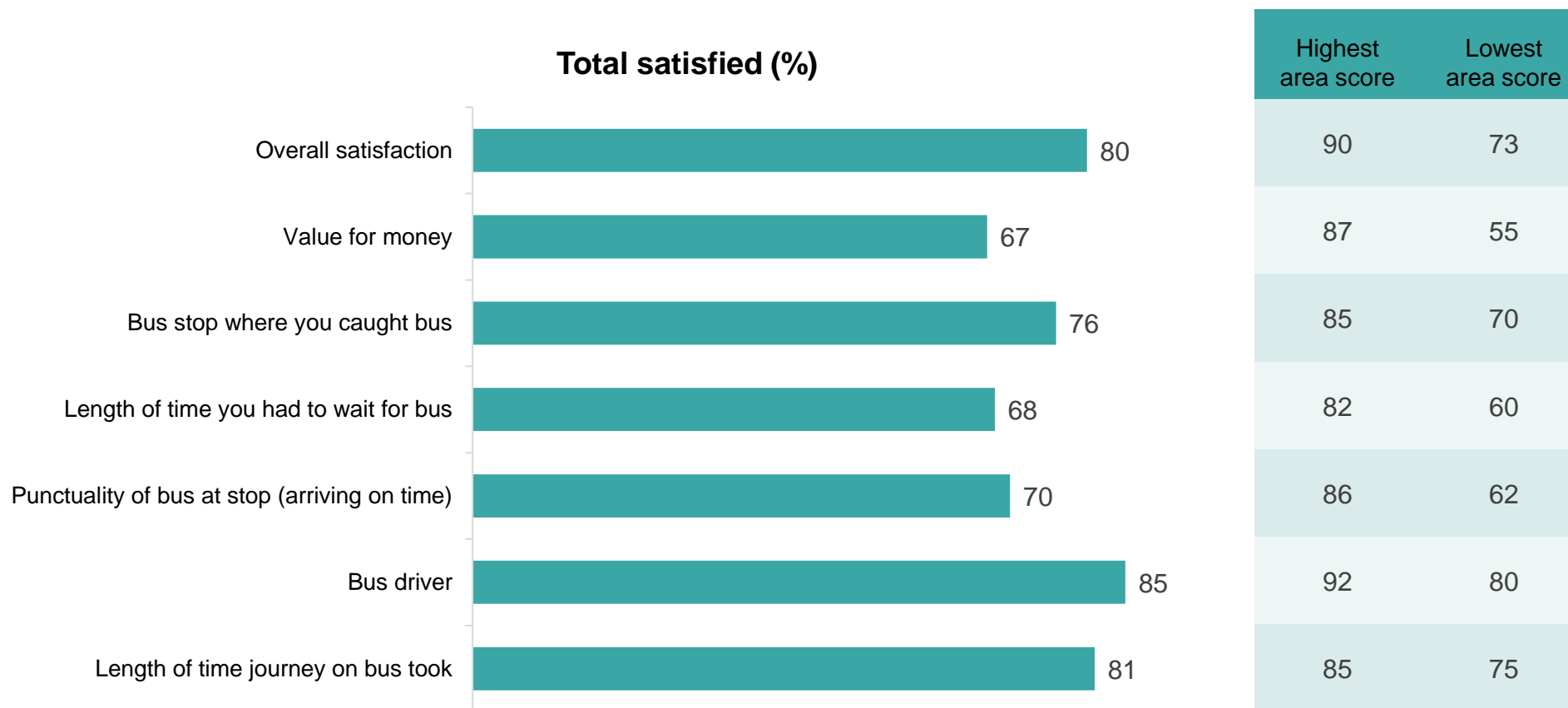
Ticket/pass validity (paid journey only) (%)



Q6 What type of ticket or pass did you use for this bus journey?  
B18 Could you tell us a bit more about the pass or ticket you used for this journey?  
B19 Who could you use your ticket or pass with?  
Base: All England areas 35044; Paid for ticket or pass only 19543 - 19581



# Overall, eight out of ten passengers are satisfied with their journey, but there is considerable variation by area



Q9 Overall taking everything into account from the start to the end, how satisfied were you with your bus journey?

Q10A How satisfied were you with the value for money of your journey?

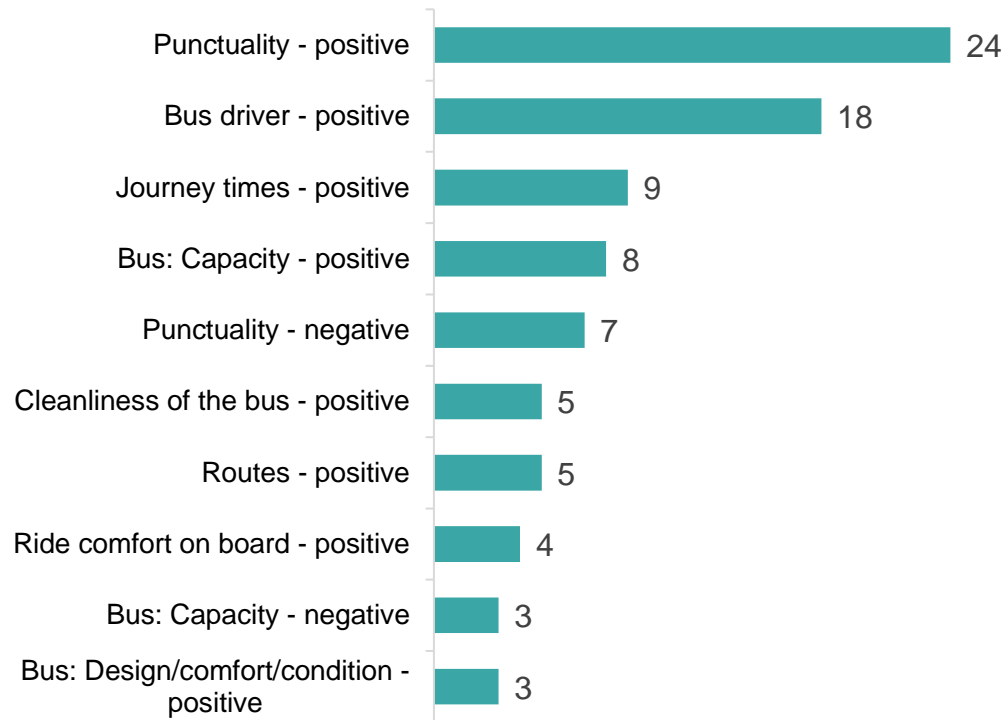
Q8 How satisfied were you with each of the following during the journey?

Base: All England areas 21431 – 34434

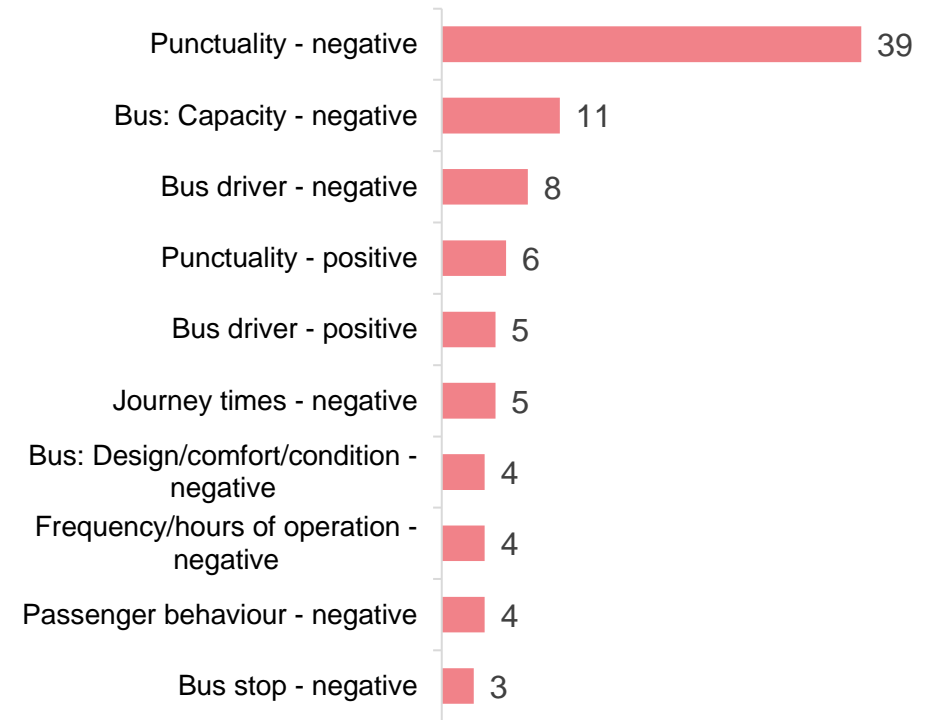


# Satisfied passengers talk positively about timeliness and drivers, dissatisfied passengers focus on delays and crowding

Comments from those “very/fairly satisfied” with journey overall – top ten themes (%)



Comments from those “neither satisfied nor unsatisfied, very/fairly dissatisfied” with journey overall – top ten themes (%)

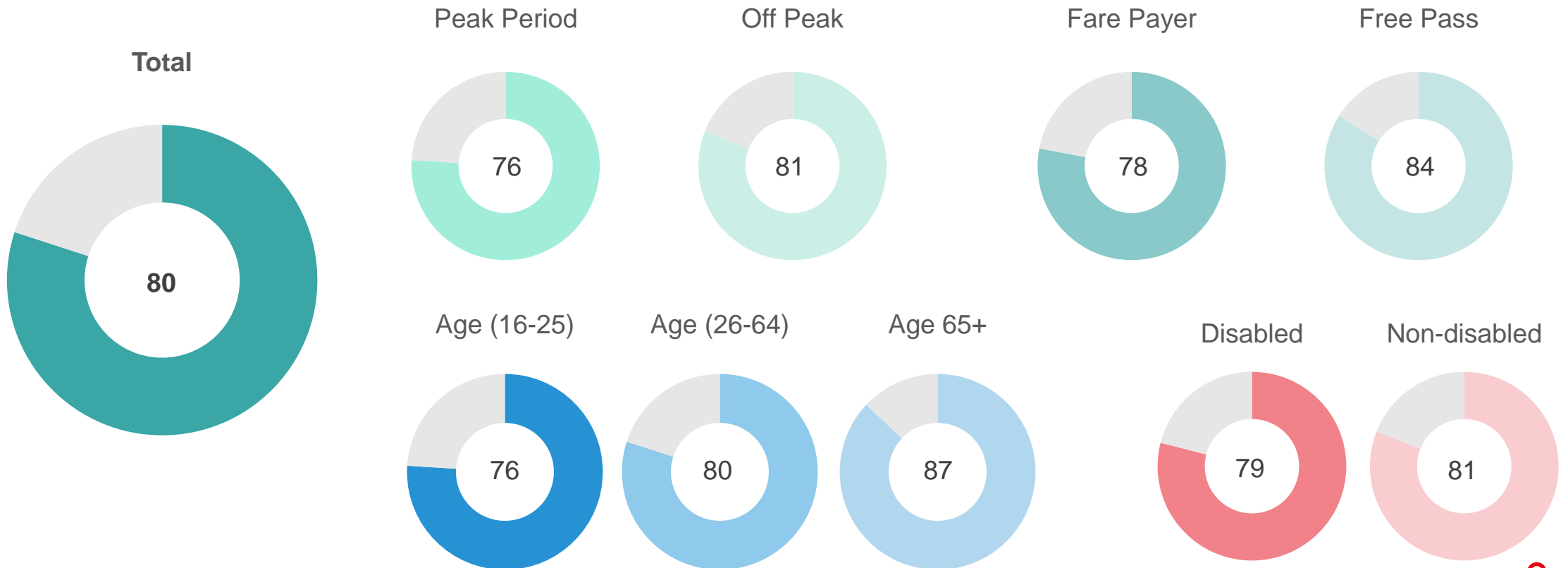


Q7 Please tell us in your own words what was good or bad about this journey. We're interested in anything that stood out about this journey.

Base: Those satisfied with journey overall 25419; Those not satisfied with journey overall 5405

# Overall satisfaction is lower for younger passengers, fare payers and those travelling in the peak periods

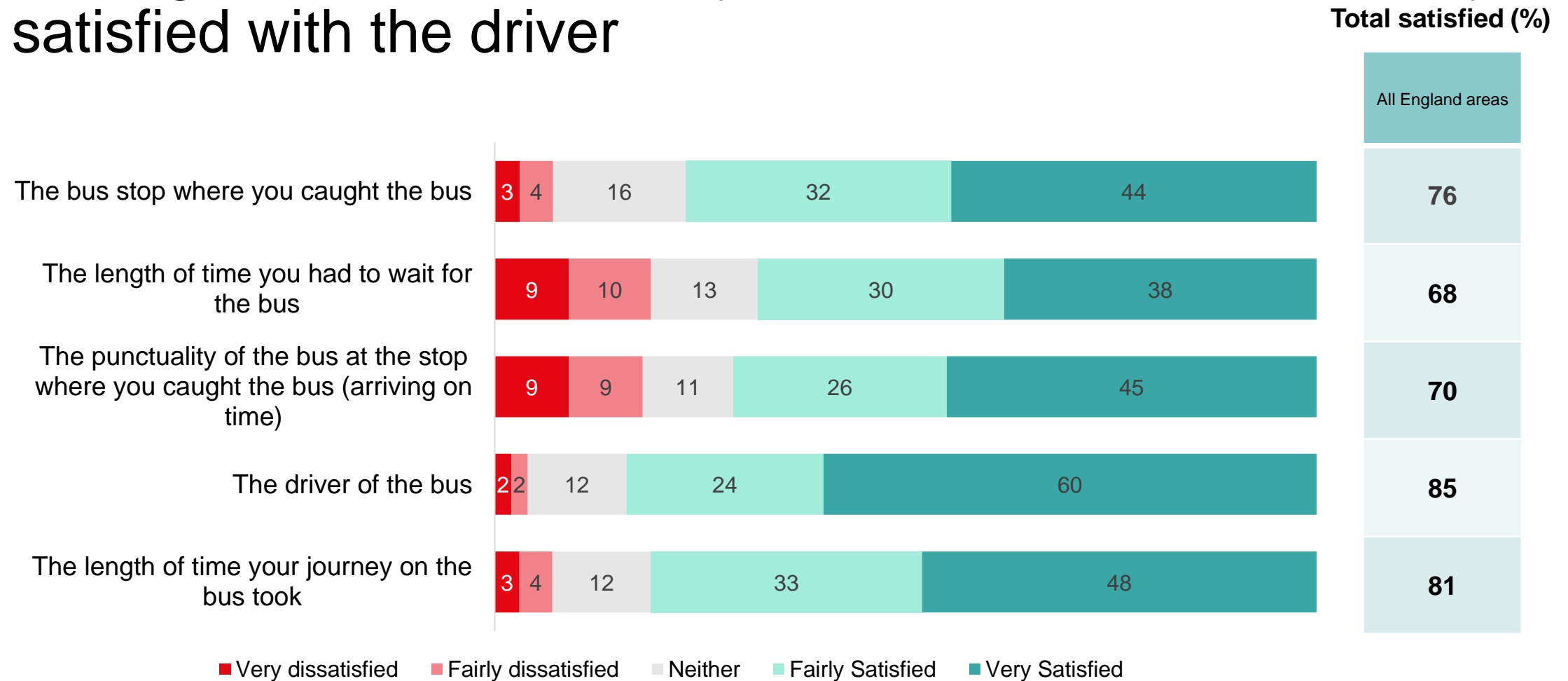
Satisfaction with bus journey (%) Total very and fairly satisfied



Q9 Overall taking everything into account from the start to the end, how satisfied were you with your bus journey?

Base: All England areas 34434; Peak 10405; Off Peak 23553; Fare-payer 21546; Free pass 10932; Age 16-25 8211; Age 26-64 16581; Age 65+ 9267; Disabled 8747; Non-disabled 20690

# Almost two out of ten passengers are dissatisfied with waiting time and punctuality, while six out of ten are very satisfied with the driver

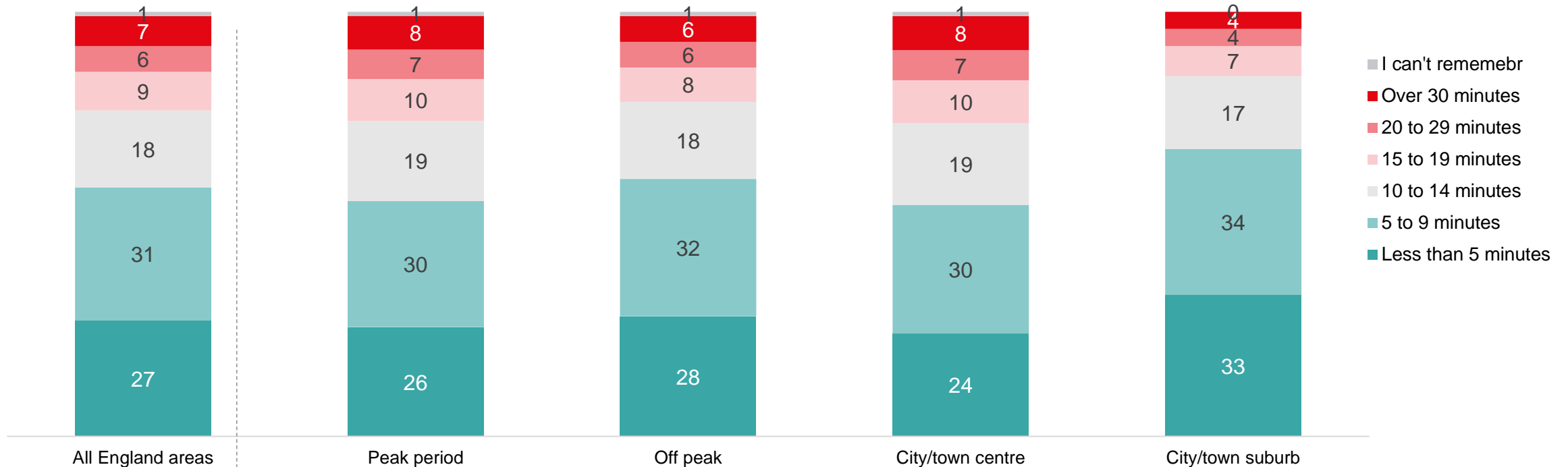


Q8 How satisfied were you with each of the following during the journey?  
 Base: All England areas 33786 - 34241



# Most passengers waited less than 10 minutes, but seven per cent waited 30 minutes or more

Length of wait for the bus (%)



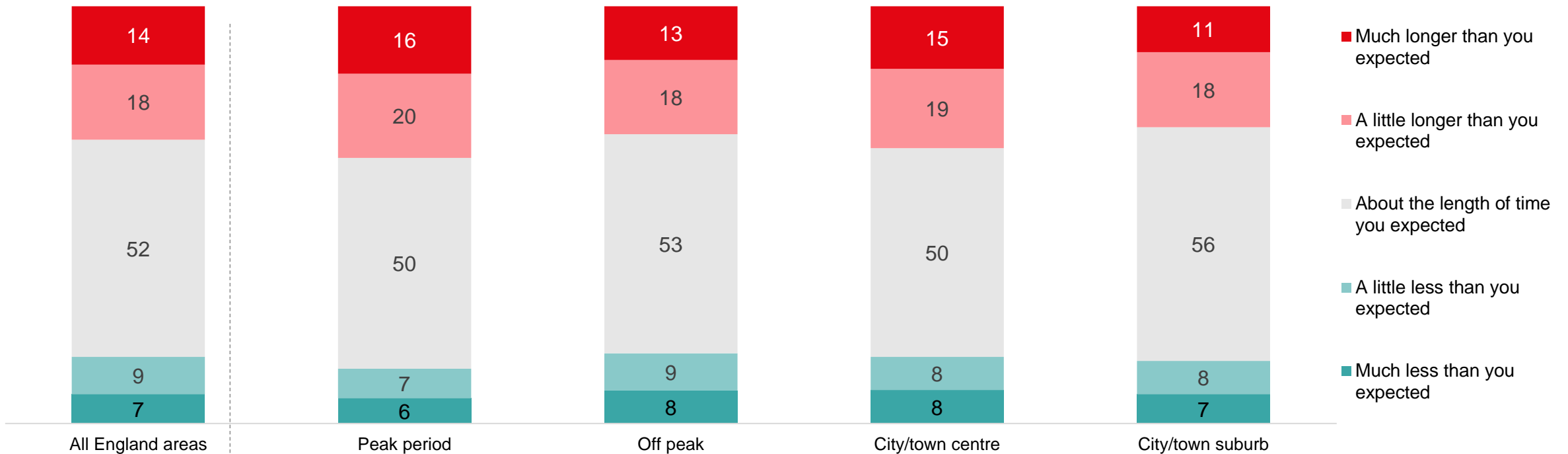
B6A How long did you wait for your bus?

B6B Was this wait time...?

Base: All England areas 33985; Peak 10182; Off Peak 23315; City/town centre 19989; City/town suburb 8261

# On balance more passengers said that they waited longer than expected than less than expected, especially in peaks

How long the wait was compared to expectations (%)



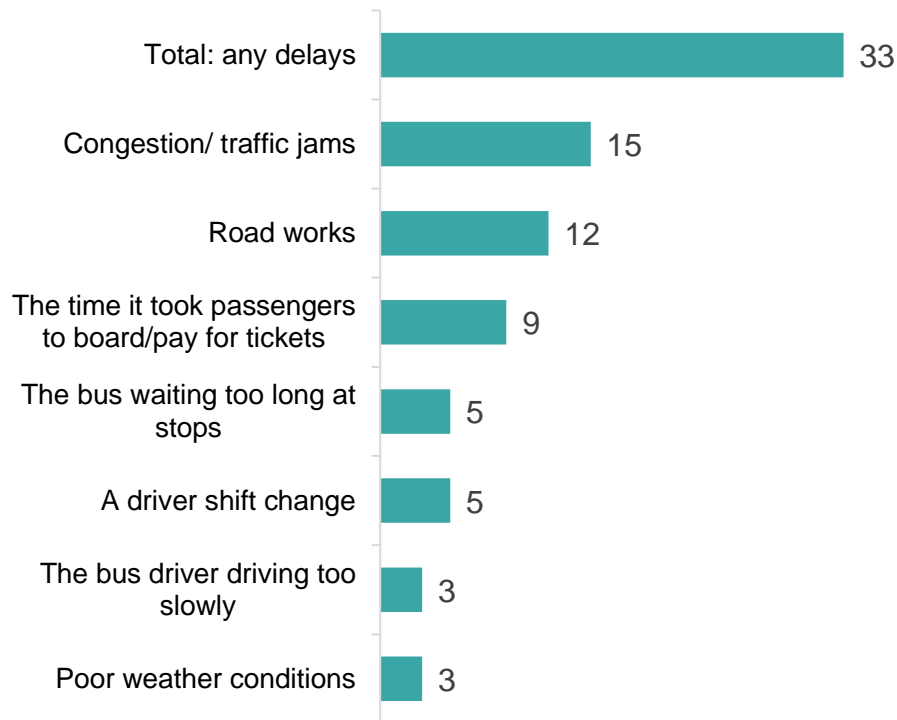
B6A How long did you wait for your bus?

B6B Was this wait time...?

Base: All England areas 33622; Peak 10113; Off Peak 23054; City/town centre 19875; City/town suburb 8209

# A third of journeys were delayed in some way, with key causes being congestion and road works

## Reasons for delay (%)



## Congestion/ traffic jams



## Road works



## Time taken to board



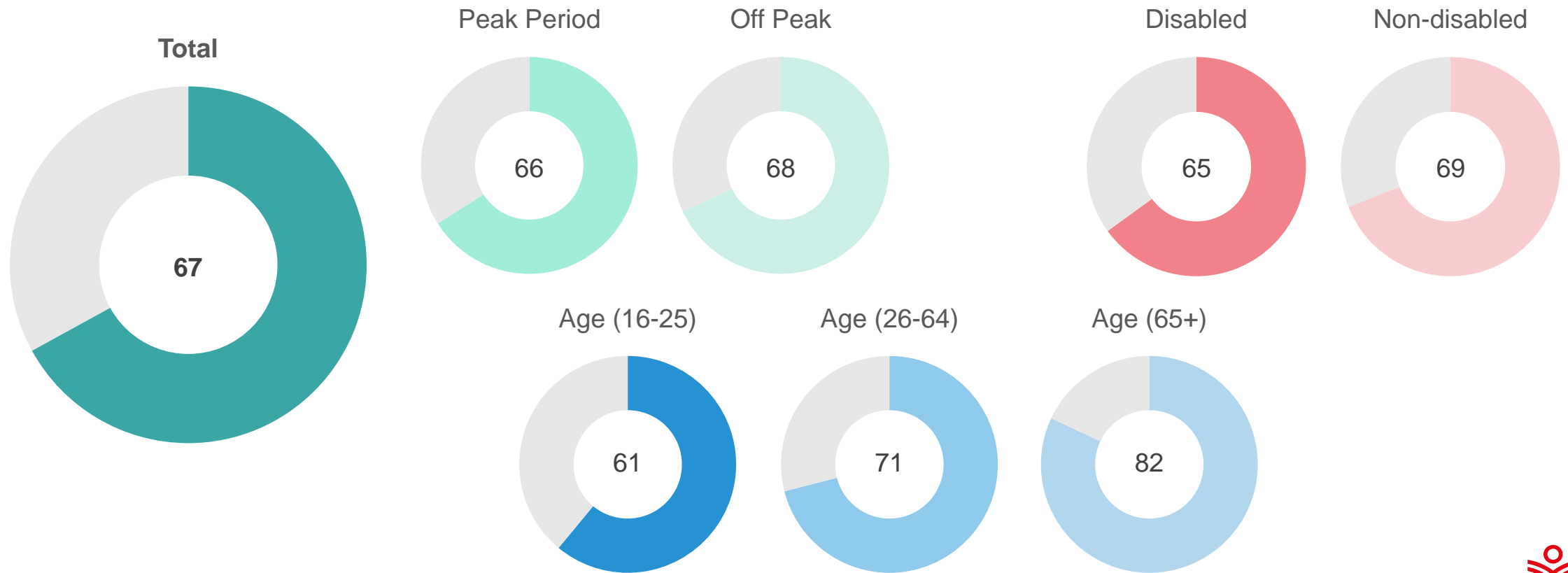
B14 Was your journey delayed by...?

Base: All England areas 35044; Peak 10526; Off Peak 24011



# Younger passengers are less satisfied with value for money of the journey, as are disabled passengers

Satisfaction with the journey's value for money (%) amongst fare-payers Total very and fairly satisfied

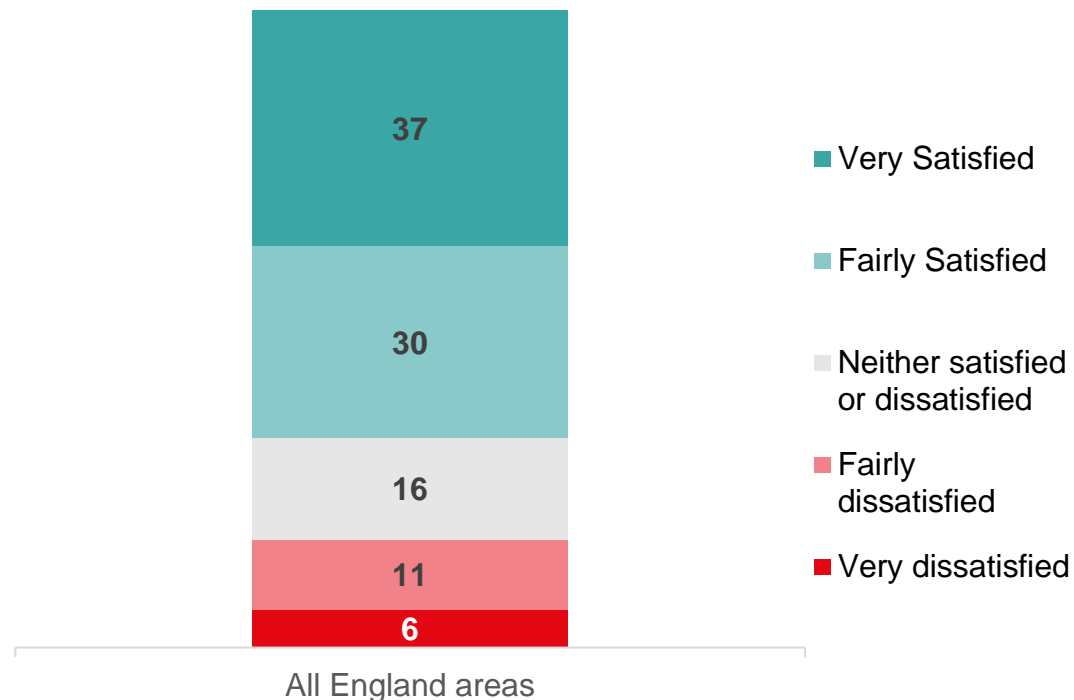


Q10A How satisfied were you with the value for money of your journey?

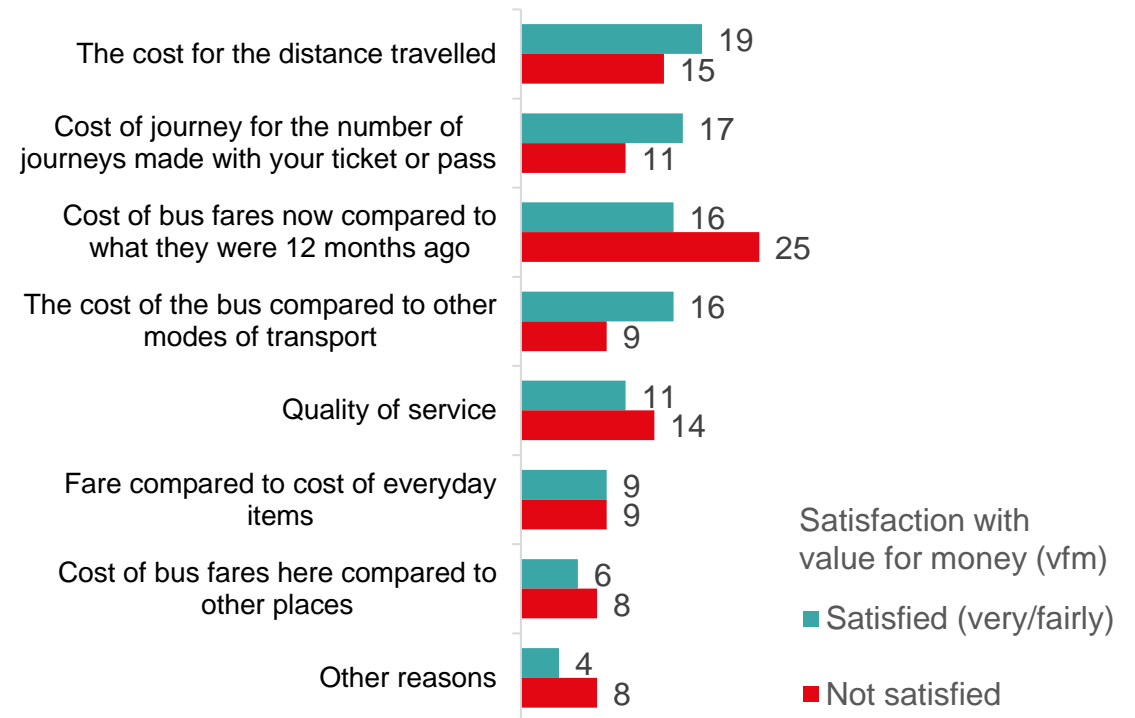
Base: Fare-payers only 21431; Peak 7805; Off Peak 13408; Age 16-25 6751; Age 26-64 13743; Age 65+ 702; Disabled 4037; Non-disabled 13790

# Around one in six passengers are dissatisfied with value for money of the journey; biggest cause is an increase in cost

**Satisfaction with the journey's value for money (%) amongst fare-payers**



**Influential factors on value for money rating (%) in All England areas**



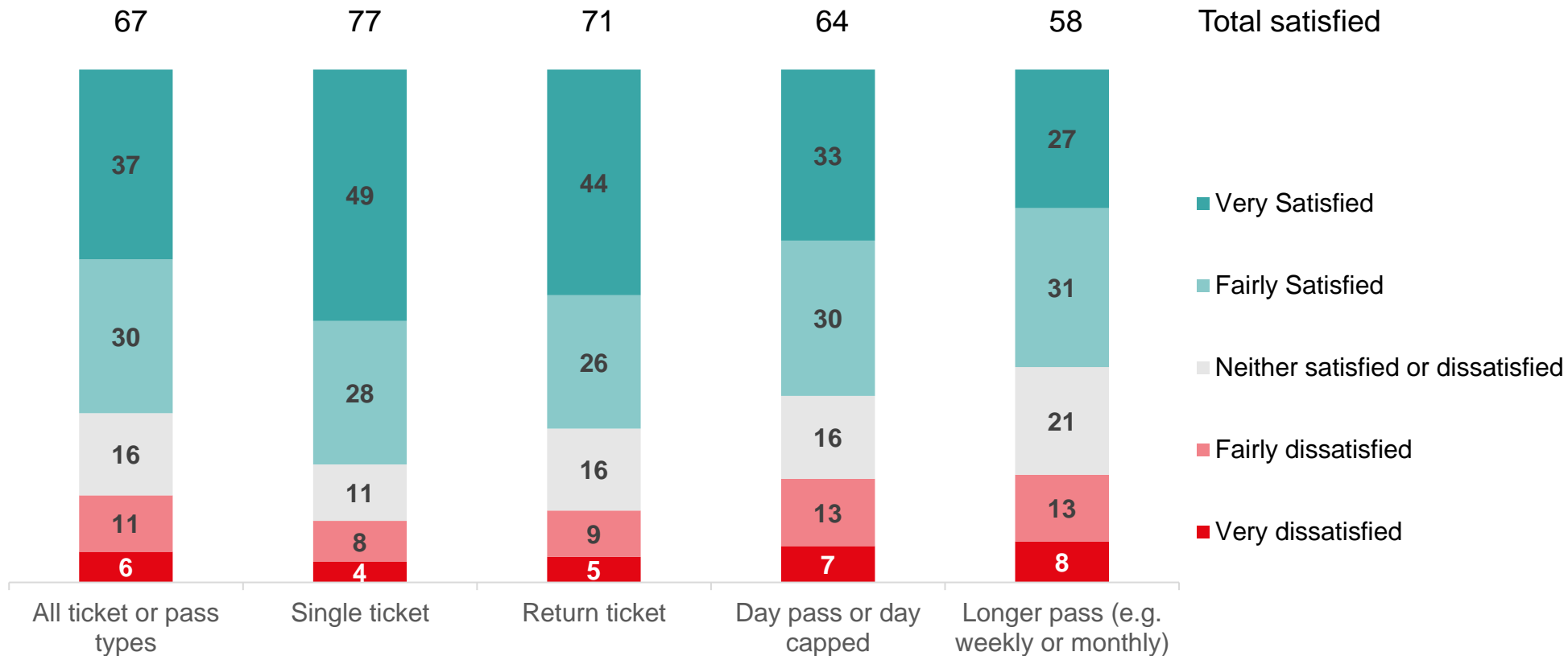
Q10A How satisfied were you with the value for money of your journey?

Q10B What had the biggest influence on your rating of the value for money?

Base: Fare-payers only 21431; Those satisfied with vfm 15138; Those not satisfied with vfm 6293

# Those using single tickets are far more likely to be satisfied with value for money than those using period passes

Satisfaction with the journey's value for money (%) amongst fare-payers – by main ticket or pass types



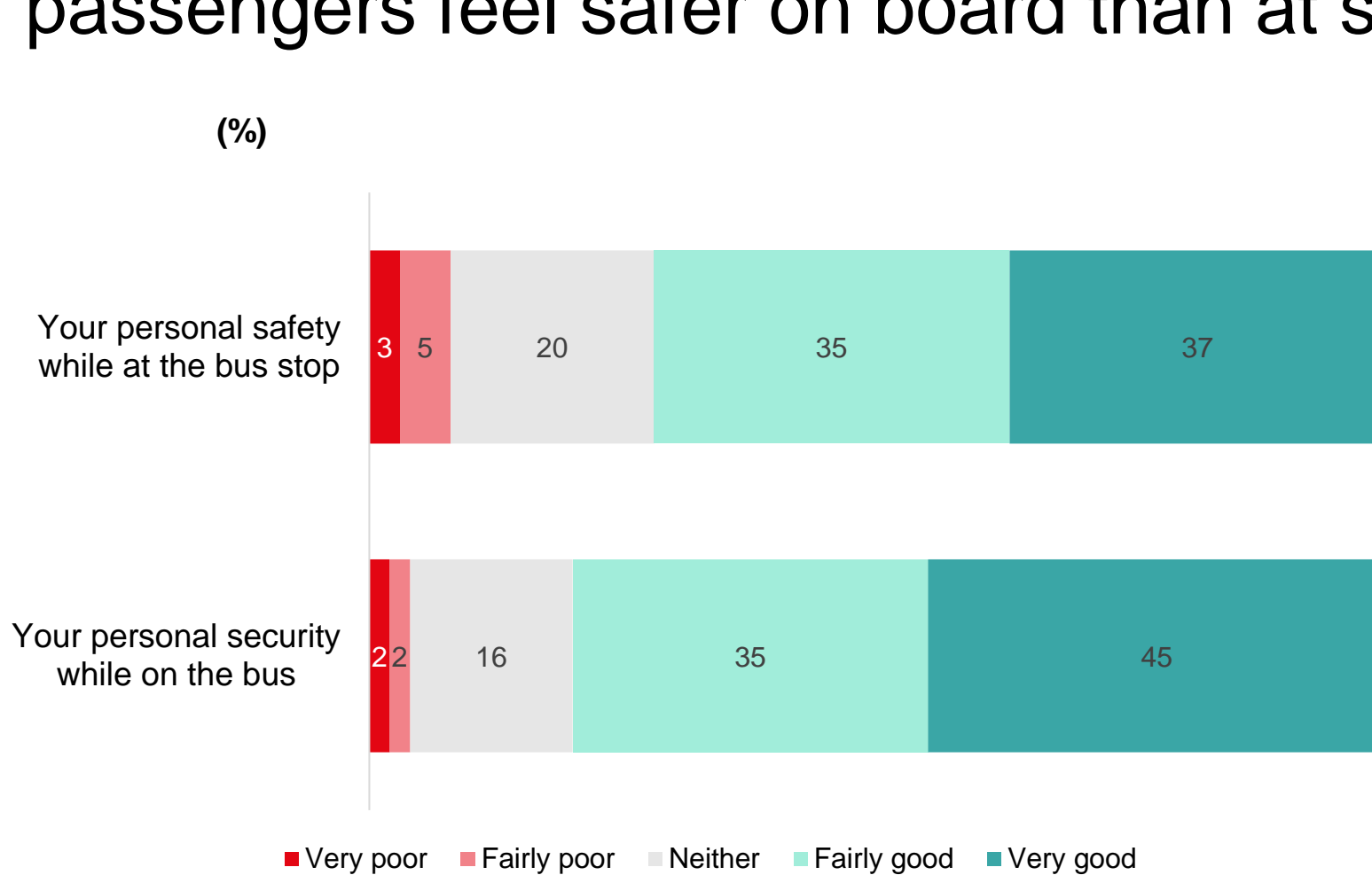
Q10A How satisfied were you with the value for money of your journey?

Q10B What had the biggest influence on your rating of the value for money?

Base: Fare-payers only 21431; Single ticket 8248; Return ticket 2052; Day pass 2674; Longer pass 4674



# Most passengers feel safe when travelling, generally passengers feel safer on board than at stops



Total good (%)

	All England areas	Highest area score	Lowest area score
Your personal safety while at the bus stop	72	81	65
Your personal security while on the bus	80	88	73

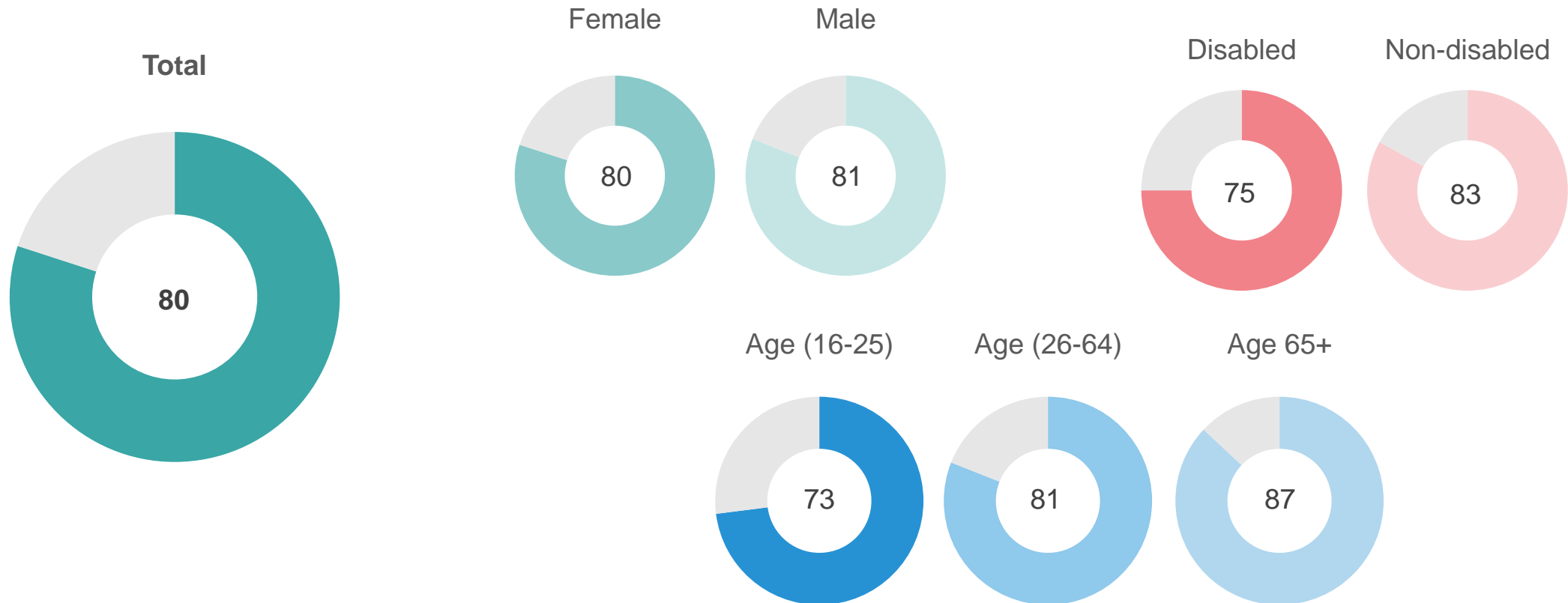
B5 Thinking about the bus stop itself, how would you rate the following...?

B8 Thinking about when you were on the bus, how would you rate the following...?

Base: All England areas 31868 – 31903; Highest area score 709 – 790; Lowest area score 941 – 953.

# Younger passengers and disabled passengers rate their personal security on the bus lower than others

Rating of personal security while on the bus (%) Total very and fairly good



B8 Thinking about when you were on the bus, how would you rate the following...?

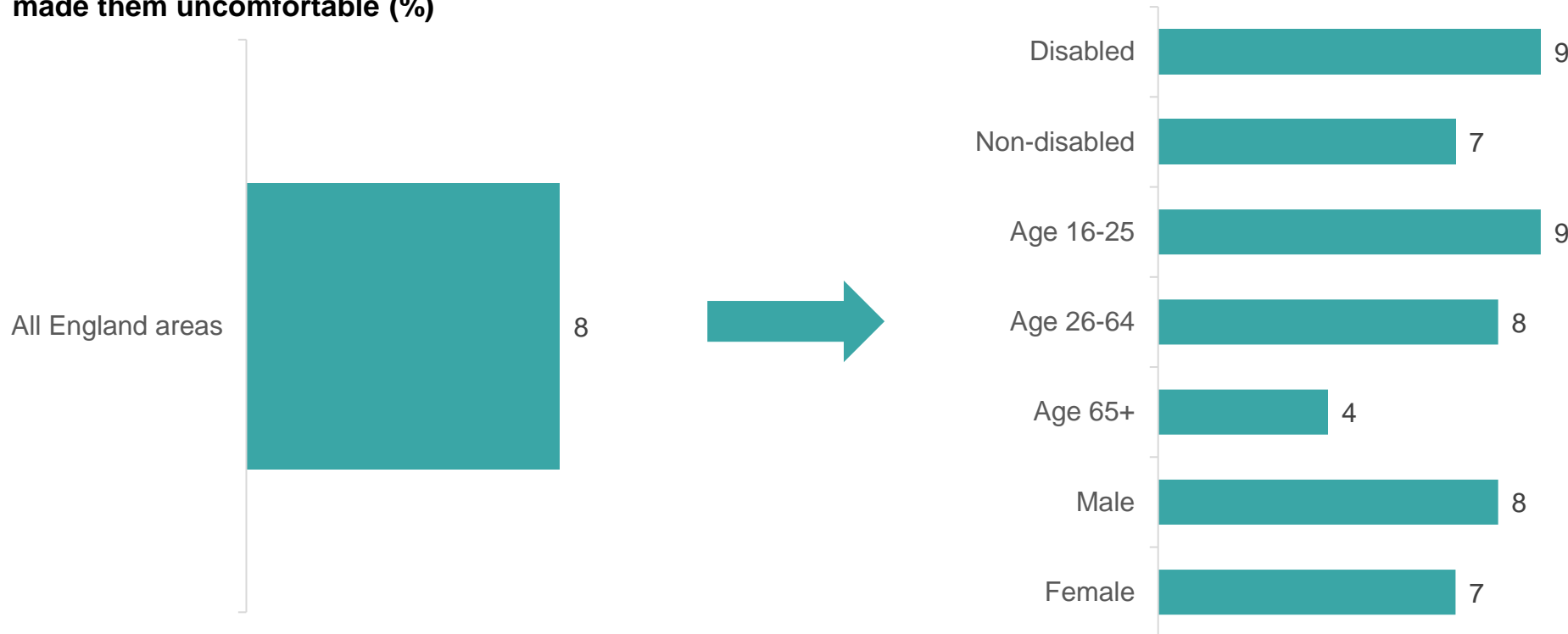
Base: All England areas 31903; Female 20169; Male 10418; Age 16-25 7347; Age 26-64 15393; Age 65+ 8521;

Disabled 8445; Non-disabled 20168.



# Other passengers' behaviour on the bus is more likely to make disabled and younger passengers feel worried

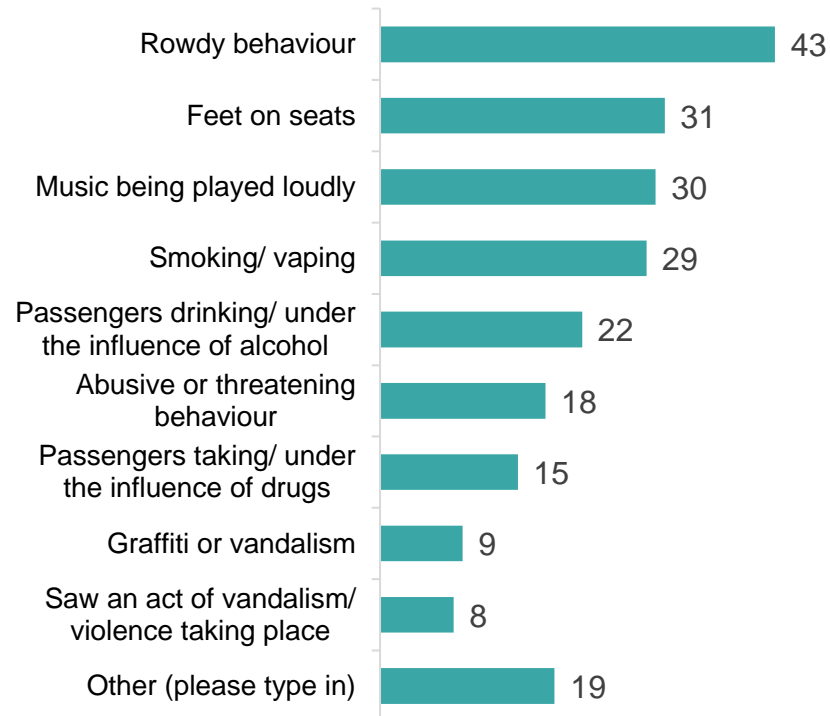
Other passengers' behaviour made them uncomfortable (%)



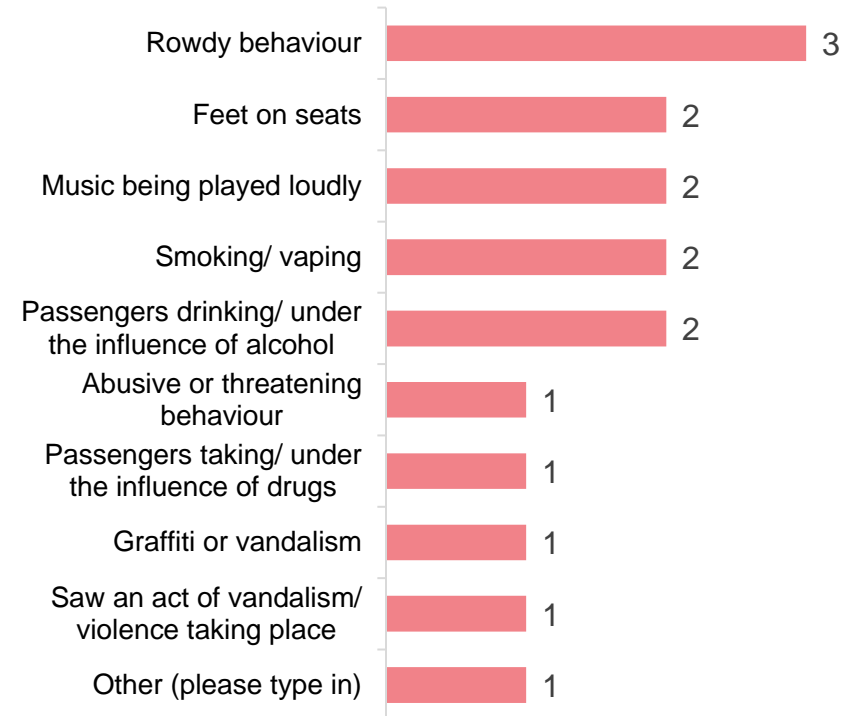
B12 Did other passengers' behaviour make you feel worried or uncomfortable during your journey on the bus?  
Base: All England areas 32762; Disabled 8791; Non-disabled 20783; Age 16-25 7455; Age 26-64 15624; Age 65+ 8976;  
Male 10703; Female 20631

# The biggest causes of concern on the bus are rowdy behaviour, feet on seats, loud music and smoking or vaping

**What behaviours made them uncomfortable**  
(% of those who were worried or made to feel uncomfortable)



**What behaviours made them uncomfortable**  
(% of all passengers)



B13 Which of the following were reason(s) for this?

Base: All passengers who were worried or made to feel uncomfortable 1946; All passengers 35044

# What some passengers said about other passengers' behaviour

“

\_\_\_\_\_

All good. Bus arrived on time. Nice friendly driver  
What I don't like in general is that some  
passengers put their feet with their dirty shoes on  
that other passengers have to sit on.

”

“

\_\_\_\_\_

Increasing use of vapes on buses. Quiet zones  
required. Too many phone calls. Very annoying.

”

“

\_\_\_\_\_

Some teenagers do not seem to have much respect  
for passengers onboard with young children I just  
think the bus driver could of said keep it down whilst  
we had stopped at a bus stop, but nothing was done  
and the loud music and swearing is unacceptable...

”

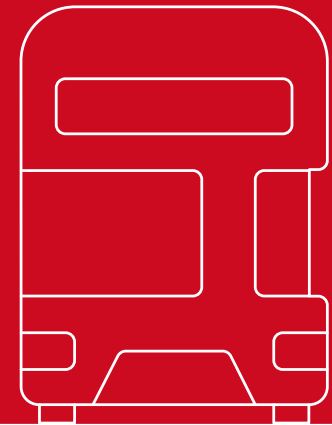
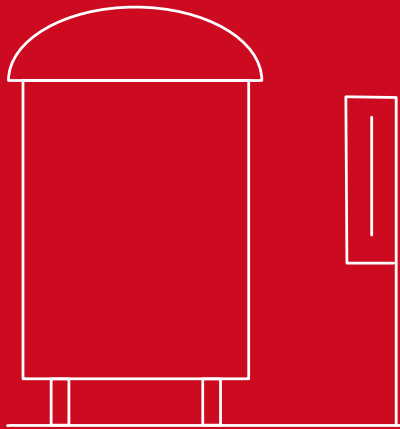
“

\_\_\_\_\_

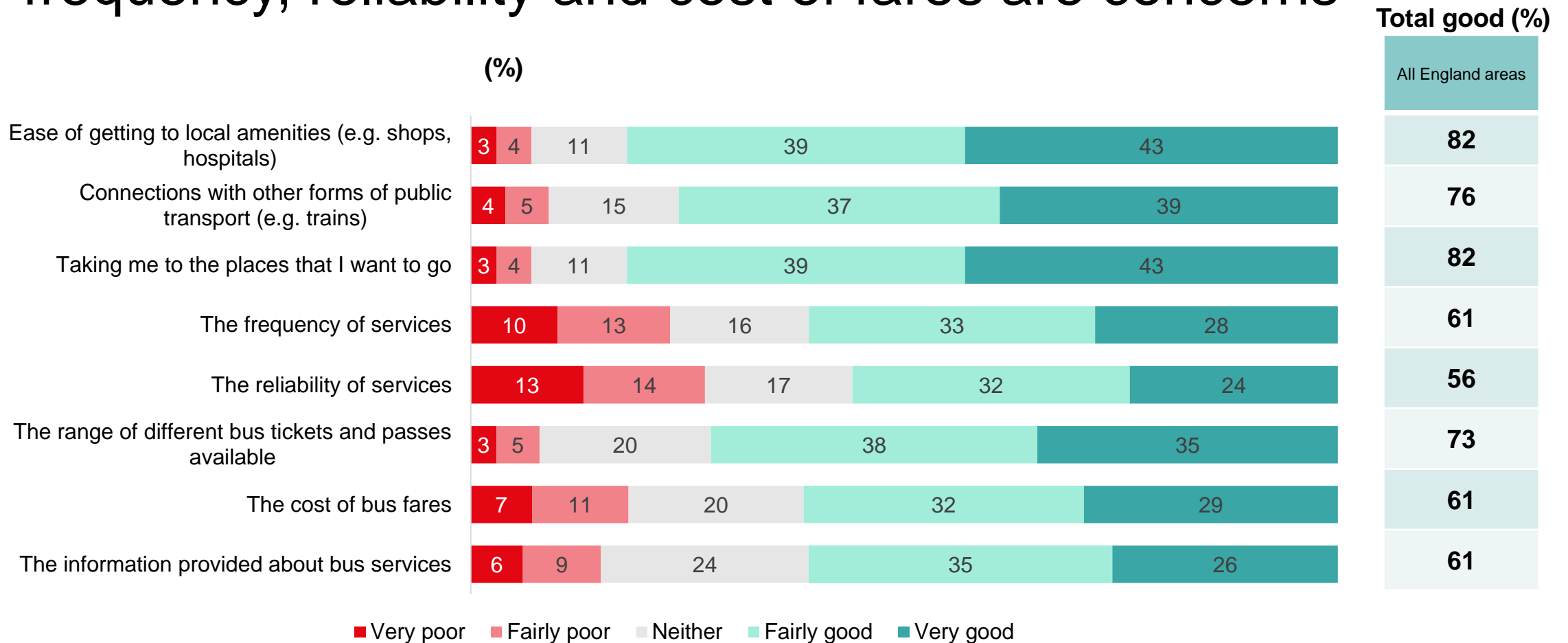
I felt intimidated by a drunken man on my bus  
journey home I felt he shouldn't have been allowed  
on the bus as he was very intoxicated talking to  
himself loudly and just made me uncomfortable.

”

# Bus services in general



# Ratings for local bus services in general show that frequency, reliability and cost of fares are concerns



B22 Thinking more generally about the bus services where you were making this journey (so not just about this particular journey) how would you rate them for the following?

Base: All England areas 22761 - 30439





# Coming soon....

We will be launching the survey results on our publicly accessible Data hub – the home for all our major ‘tracker’ surveys.

[www.transportfocus.org.uk/data-hub/](http://www.transportfocus.org.uk/data-hub/)

And we will be releasing further insights from the 2023 survey findings throughout 2024 – all available on the new dedicated Your Bus Journey page on our website.



transportfocus

Transport Focus data hub Rail User Survey Motorway Services User Survey Strategic Roads User Survey Logistics and Coach Survey  
Electric Vehicle Charging Survey Contact us Help

Transport Focus data hub

**Welcome**

We are the independent transport user watchdog. Our mission is to get the best deal for passengers and road users.

From this page you can find the results of Transport Focus 'tracker' surveys (repeating surveys where we track user satisfaction over time).

Transport Focus has taken care to ensure that the information contained in the data hub is correct. However, no warranty, express or implied, is given as to its accuracy and Transport Focus does not accept any liability for error or omission.

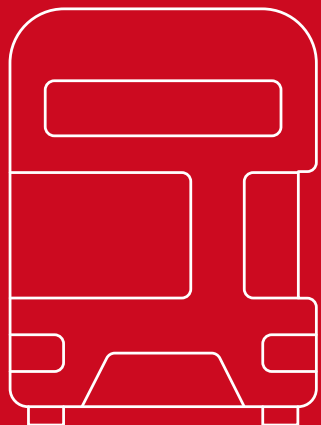
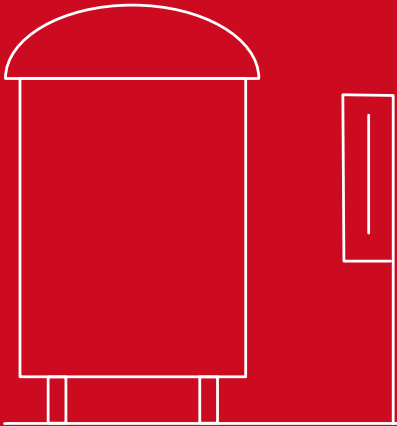
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Coming Soon Your Bus Journey  
Strategic Roads User Survey (2018 onwards)  
Coming Soon Lorry Driver Facilities Survey  
Rail User Survey (2021 onwards)  
Logistics and Coach Survey (2020 onwards)  
Coming Soon Dartford Crossing User Experience Survey  
Motorway Services User Survey (2017 onwards)  
Electric Vehicle Charging Survey (2023 onwards)  
Historic Transport Focus surveys

Better data by design with Dapresy Pro  
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Thank you

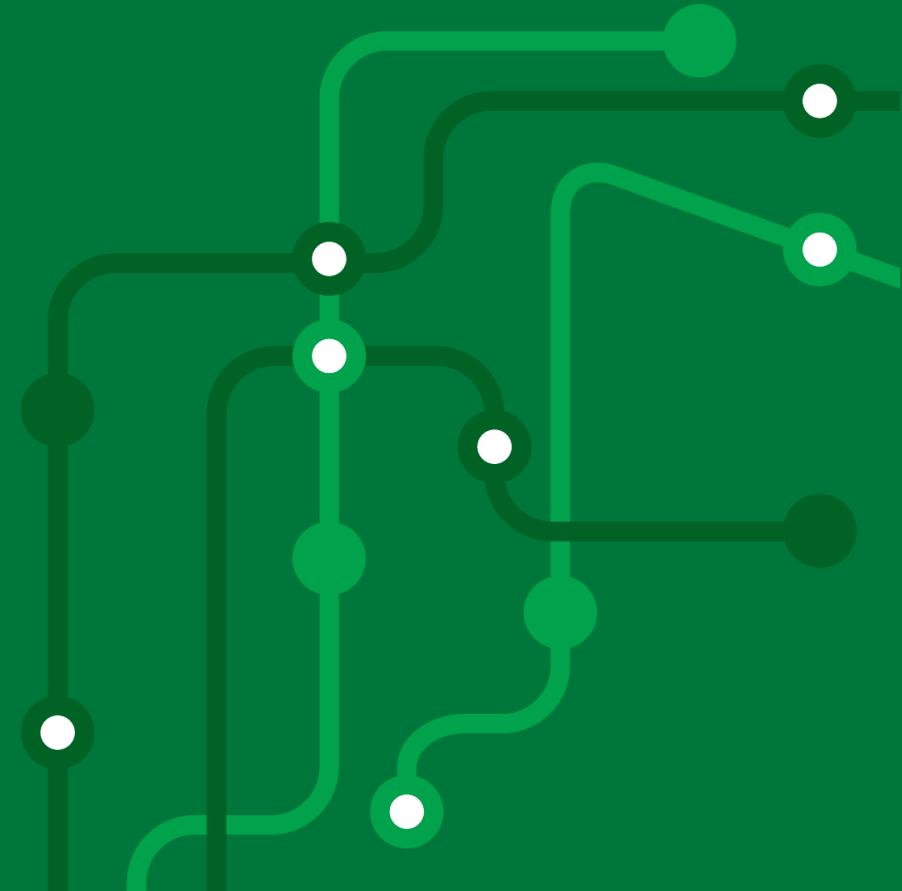


# Transport **North East**

## **North East Partnership**

13 March 2024

Moving to a green, healthy, dynamic and thriving North East.



# Get Round for £

21 and Under – Single £1, day ticket (multi-modal) £3

**GET ROUND FOR A £**

If you're 21 or under\*, **go by bus** for a cheaper, greener way to get 'round for just £1!

\*Proof of age may be required. Terms and conditions apply.

Funded by UK Government  
Transport North East

**OR**

**Go by bus, Metro or ferry!**

Buy a £3 unlimited dayticket to get round County Durham, Northumberland and Tyne and Wear

\*Proof of age may be required. Terms and conditions apply.

Funded by UK Government  
Transport North East

**GET ROUND FOR A £**

**LUMIERE**

...if you're 21 or under, you can visit the Lumiere festival on any bus for just £1

**OR** buy a £3 unlimited day ticket to get round County Durham, Northumberland and Tyne and Wear **and you can go by bus, Metro or ferry!**

**GET ROUND FOR A £**

...if you're 21 or under, you can get back to sixth form on any bus for just £1

**OR** buy a £3 unlimited day ticket to get round County Durham, Northumberland and Tyne and Wear **and you can go by bus, Metro or ferry!**

Designed and agreed in partnership with operators and LA's.

Your bus journey survey has helped us show that this is well received and young people feel this is good value for money

**GET ROUND FOR A £**

If you're 21 or under\*, **go by bus** for a cheaper, greener way to get 'round for just £1!

**OR** buy a £3 unlimited day ticket to get round County Durham, Northumberland and Tyne and Wear **and you can go by bus, Metro or ferry!**

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Transport North East

Moving to a green, healthy, dynamic and thriving North East.

**Transport North East**

# Service enhancements

- Lots of partnership working, not just with operators but employers in the region.
- New services to connect to the regions airport over night to support staff.
- Earlier and amended timetable to coincide with shift patterns at Nissan, one the regions largest employers.

**CATCH THE 787 TO BOARD A 737!**

The Number 787 is a brand new service linking the city centre to Newcastle Airport. Get on board the new service from Newcastle via the west end to the airport in time to catch the early morning 6am flights.

Newcastle International  
Your Airport

Transport North East  
Funded by  
UK Government

www.transportnortheast.gov.uk

**NEW NISSAN NIGHT BUS**

The Number 50 bus has two new added times for early morning trips.

Catch the new service at 1am from Concord to South Shields and 6am from South Shields to Concord.

NISSAN

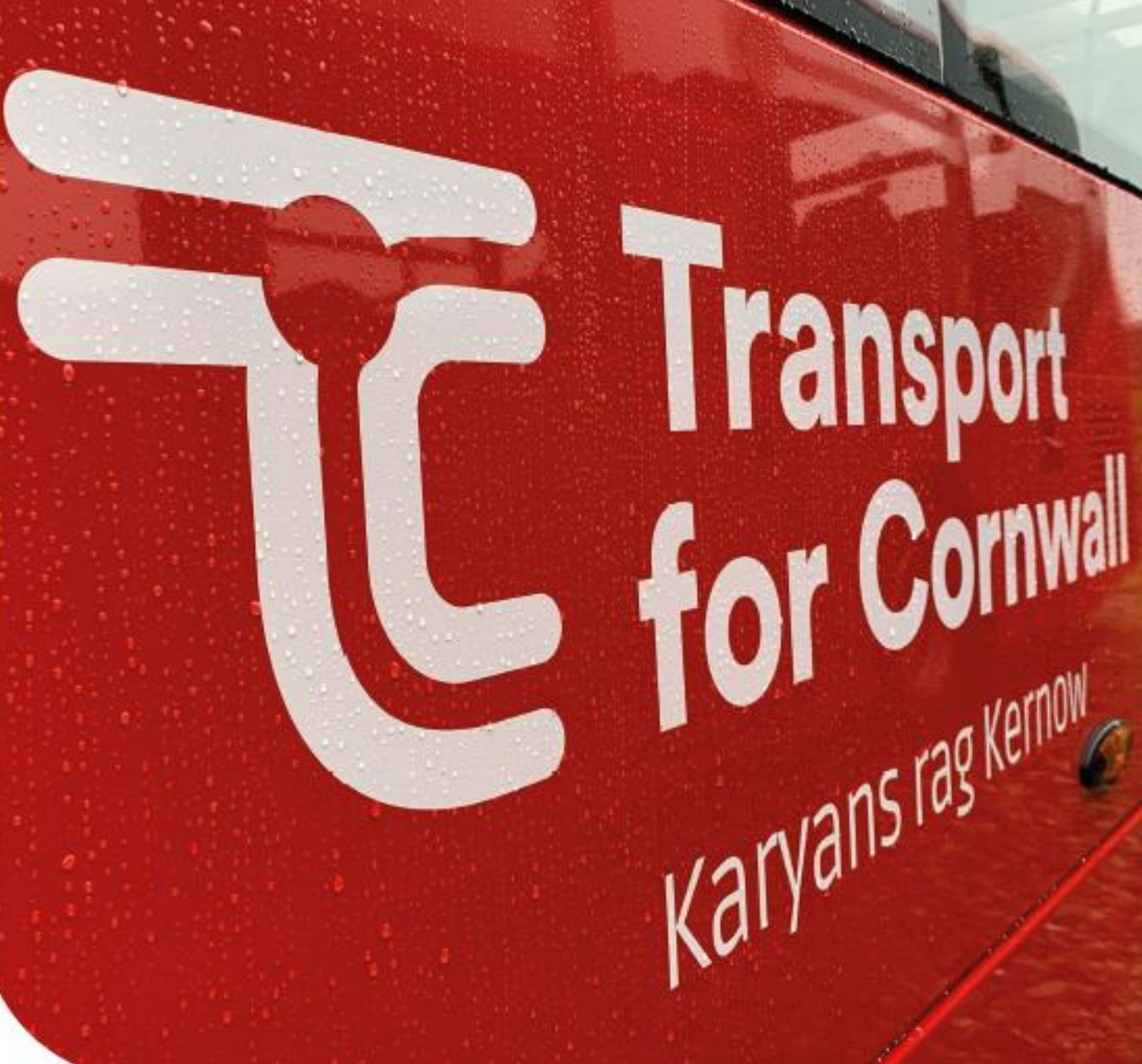
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Funded by  
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transportnortheast.gov.uk

# Customer experience

- Heavy focus in our BSIP on the customer experience of using the bus
- Further customer service training being developed for drivers
- Funding being provided for more staff to be at stations and interchanges to support passengers, especially during disruptions
- Specific staff in our urban traffic management centre (UTMC) to focus on bus, looking at options for large events where operator staff are also located in the UTMC to help with coordination.





# Customer Focus – How it influenced rural transport in Cornwall

Melanie Watson  
Director – MW Associates PTS  
Supporting Cornwall Council

# Overview

- Context
- Listening to Users / Non-Users
- Customer Priorities
- Long term investment programme
- Bus Fares Pilot
- Customer Outcomes



# Context

- Cornwall – rural county / seasonal population boost
- Cornwall has a well-established vision for an integrated public transport system
- Recent history of strong investment and partnership working with our operators
  - £15.5m Growth Deal
  - £35m Operator investment
  - £23.5m Bus Fares Pilot
  - £17m BSIP
- Comprehensive transformation of the network with the customer and the customer journey at the heart of our delivery



Significant improvements to the network, fleet, information provision, ticketing, reduced fares, infrastructure, marketing & branding





# Listening to users / non-users

- Customer research undertaken by Cornwall Council between 2016-19 and refreshed during 2023
- Transport Focus Surveys – Your Bus Journey and previous Bus Passenger Satisfaction
- DfT Segmentation Tool



# Customer Priorities

- DfT segmentation work suggests a challenging picture - in Cornwall 59% respondents never used the bus, compared to 42% across all areas
- Cornwall's research identified the following areas of dissatisfaction:
  - Cost of fares
  - Ticket structure
  - Fragmented network
  - Reliability
  - Punctuality
  - Journey Planning
- Transport Focus Research over the years showed improving levels of overall satisfaction, but stubbornly low value for money results.

Transport Focus BPS	2018/19	2019/20
Overall Passenger Satisfaction	90%	93%
Value for Money	58%	57%



# Getting the foundations right

- One integrated ticketing platform – delivered 2017
- Contactless ticketing and infrastructure investment 2018/19
- Network Review and new 8-year tendered contract – 2020
- One brand, network map & timetable 2021 - TFC
- BSIP/BFP continues investment....





# Bus Fares Pilot

- £23.5m scheme to reduce fares across Cornwall – launched 10<sup>th</sup> April 2022
- Average reduction of one third across tickets, some up to 50% cheaper
- Required hard negotiation with operators – historically high commercial fares and no appetite for interoperable tickets



# Fares – the journey

- Cornwall's Bus Fares Pilot ticketing timeline to 2026:



# Achievements

- Patronage in Cornwall bounced back quicker post-covid-19.
- Total journeys on Cornwall's bus network is 14% higher in 2023 compared to 2019
- Fare paying passengers now represent a more significant proportion of bus passengers – this is good news for operators revenue!
- Cornwall's research highlights:
  - Just under half of respondents are using buses more frequently
  - The more people use buses, the more likely it was to become part of their routine
  - Two fifths said they had made more bus journeys as a result of the reduction in bus fares
- Transport Focus YBJ results – dramatic improvement in value for money score – 75% and strong overall satisfaction – 85%



Thank you



**Melanie Watson**, Director, MW Associates PTS - representing Cornwall Council [mwassociatespts@gmail.com](mailto:mwassociatespts@gmail.com)







**Mark Collins**  
Commercial Director



# What is Transport for Cornwall?

Long-held ambition to have a single, unifying brand for public transport in Cornwall

- Make public transport easier to understand and use
- Demonstrate the integrated nature of the network
- Develop tools to bring all the information together in one place

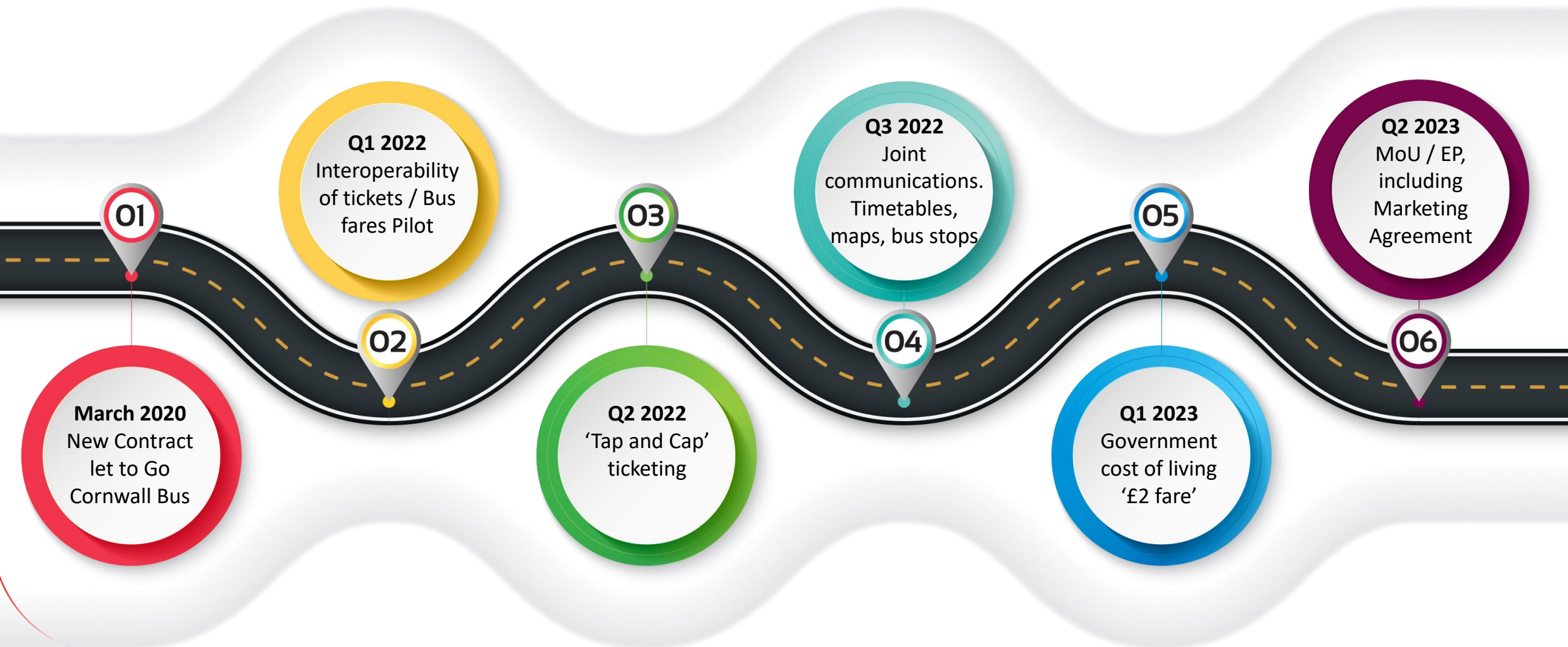


Delivered by:



[www.transportforcornwall.co.uk](http://www.transportforcornwall.co.uk)







# 2020 – The start of TfC

New 8-year Cornwall Council contract for the let to Go Cornwall Bus delivering...

- 104 brand new Euro 6 low emission buses
- Newest rural bus fleet in UK
- More integration with Schools and Rail
- Red Buses with new TfC brand
- Improved interchange opportunities
- Improved roadside facilities & information



# 2022 – Interoperability, BFP, Tap and Cap

A big change for bus ticketing in Cornwall

- Any ticket could be used on any bus
- Reduced fares by up to 40%
- Discounted tickets for under 19's
- New town zones introduced
- Tap and Cap



 **Transport  
for Cornwall**  
Karyans rag Kernow

Connecting Cornwall's Communities

Cornwall by      

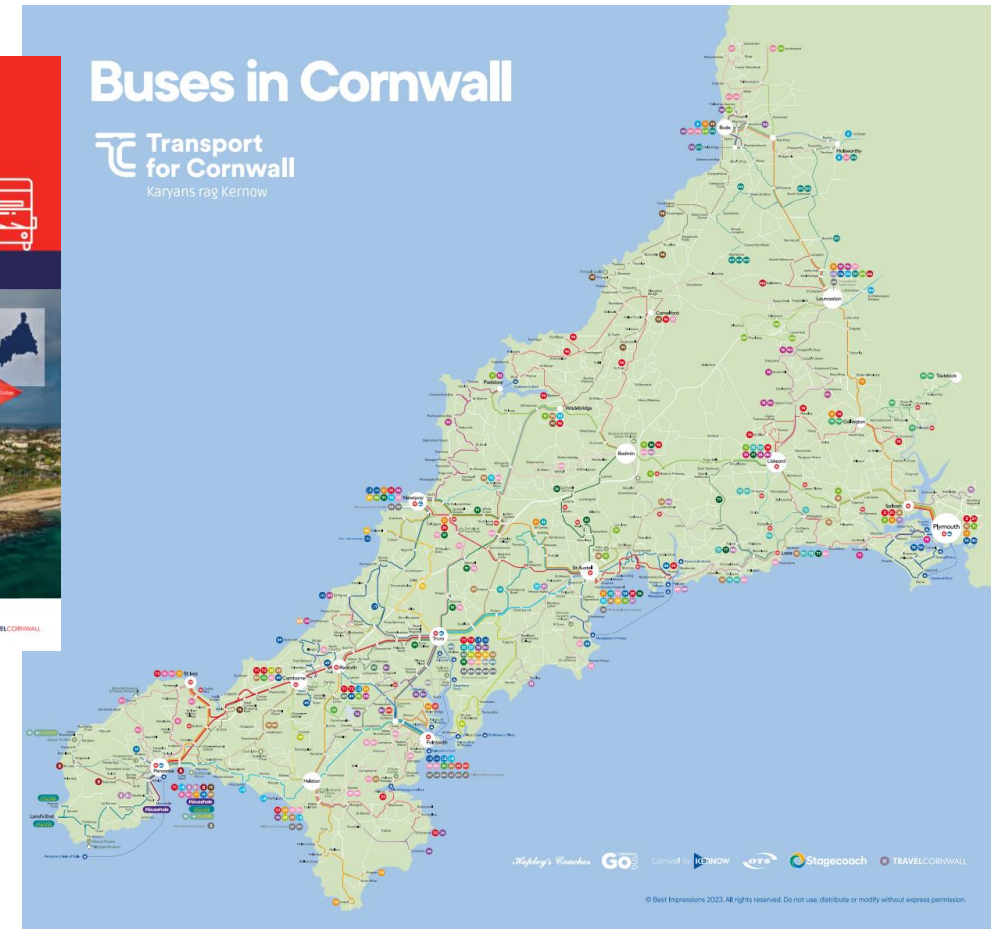
 **Transport  
for Cornwall**  
Karyans rag Kernow

[www.transportforcornwall.co.uk](http://www.transportforcornwall.co.uk)

# 2022 – Joint Communications

All bus information in one place (nearly)

- Passenger Charter
- New bus map for Cornwall, featuring all operators
- One timetable book featuring all operators
- Combined bus stop information
- TfC microsite launched
- Events, inc Royal Cornwall Show





# 2023 – £2 fare

## Government 'Cost of living' scheme

- Capping any single ticket at £2
- Savings on top of the Low Bus fares Pilot

Single fares  
£2

## Where could our £2 bus fare take you?

A single fare is still £2!  
So, why not take the bus more for less!

Supported by

HM Government

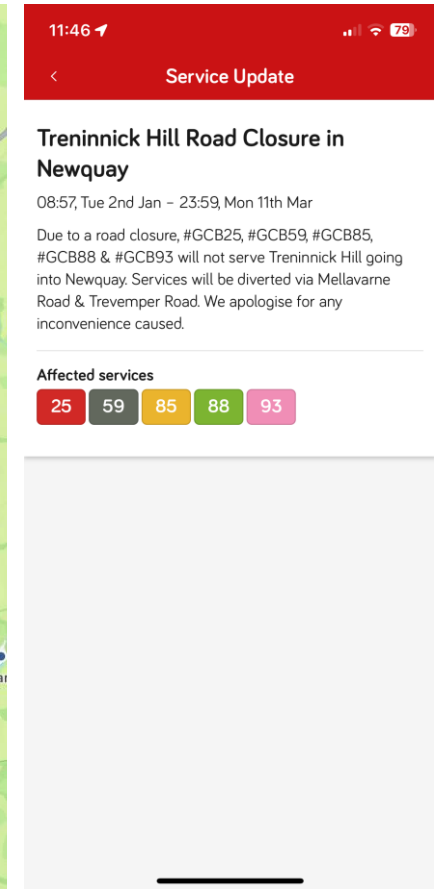
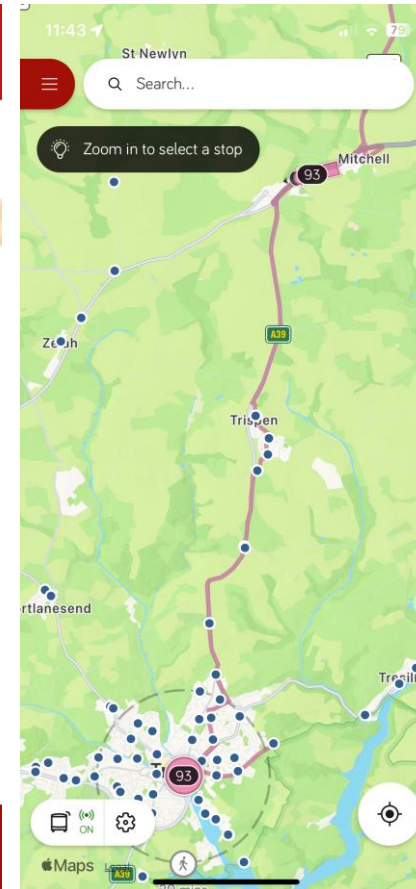
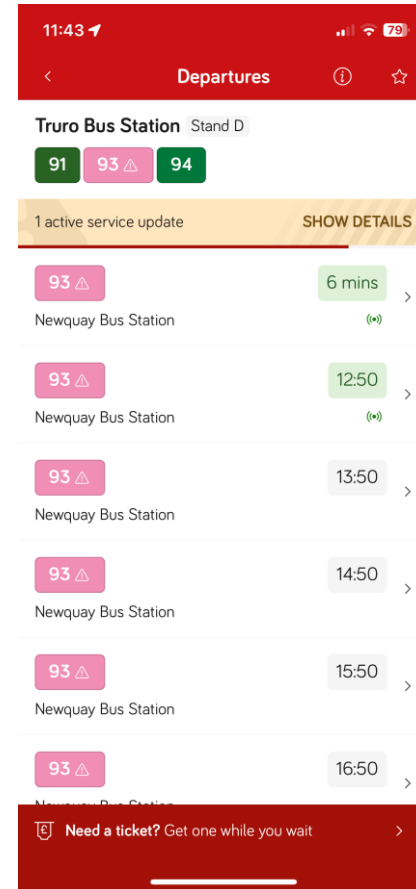
Help for Households

GO bus CORNWALL

# 2024 – MoU and EP

## Memorandum of Understanding and Enhanced Partnership

- Delivering one goal with a joint budget
- More campaigns
- More community engagement
- New TfC website and app
  - Live bus tracking
  - Journey Planning
  - Tickets
  - Service disruption / updated



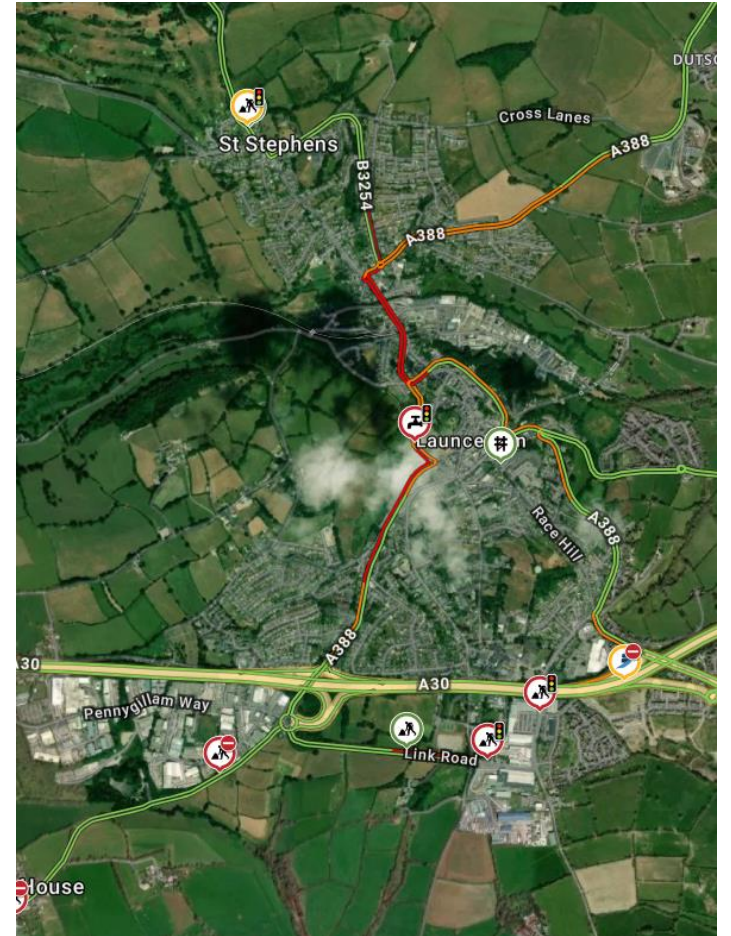
# Other achievements

- Support from Transport Minister – visits in Feb & Aug 2023
- Seen as leaders in rural bus
- National Transport Awards 2023 – Winner of Best Alliance/Collaboration
- UK Bus Awards 2023 – Finalist for Best Campaign



# Future Challenges

- Seasonal Congestion
- Bus Priority
- Future funding uncertainty
- ZEB in deep rural areas
- Roadworks process





Thank you



Norfolk County Council

# You said – we did

Using passenger feedback to deliver improvements



# Norfolk's BSIP written using Transport Focus research on what people want from their bus services:

- Buses running more often
- Buses going to more places
- More buses on time / faster journey times
- Better value for money
- Better information at bus stops
- Accessible buses



# Buses running more often

- 13 services with increased frequency  
e.g. hourly to half-hourly
- 33% of Norfolk's population now have a more regular bus service
- 7 services with added evening journeys  
(covering 21 parishes)
- Enhanced Saturday services (covering 43 parishes)
- 6 new or enhanced Sunday services



# Buses going to more places

- 6 completely new services
- 6 route extensions to more villages
- New commercial routes put on by operators
- More people now have more options to use the bus
- Nearly half of Norfolk's population have seen an improvement to their public transport offer



# More buses on time / faster journey times

- 8 new bus lanes
- 9 junction and road improvements
- Traffic light priority
- Bus stop clearways
- Moving traffic and parking enforcements





# Better value for money

- £2 single flat fare (national scheme)
- £1.50 single flat fare in 2 urban areas
- 25% discount on weekly, monthly and group tickets
- Simplified and cheaper P&R fares
- County-wide multi-operator day ticket (travel across Norfolk with your family for £22!)



# Better information at bus stops

- 7 new travel hubs linking bus, walking and cycling (and some the train too)
- 20 gold stops with real-time information and better waiting areas
- 50+ stops with real-time information screens
- QR Boards at all bus stops – for scheduled and real-time information  
(still have printed information too.....)



# Accessible buses (and stops)

- Operator investment in new vehicles.....
- .....and in next-stop announcements
- >100 accessible boarding points in rural areas
- Spoken bus times at new travel hubs and gold stops



# Recipe for success

- Good partnership with bus operators
- An effective Enhanced Partnership Board
- Listen to your customers
- Funding (even if short-term)
- Marketing and promotion
- Good relationships with Members / districts / parishes / user groups
- Make bus travel easy and joined-up



# The proof is in the pudding.....

- Passenger numbers up by 16%
- Overall satisfaction increased from 78% to 81%
- All satisfaction scores higher than the previous 6 months
- Happy customers.....  
“this new stop is like a little bit of heaven”  
(quote from someone at a new gold stop in Hunstanton)
- Sanders Coaches named Independent Operator of the Year at the UK Bus Awards







# Your Bus Journey 2023 survey results

## Panel Discussion

13 March 2024





Thank you !

13 March 2024