



Your Bus Journey

The independent bus user survey

Executive summary - 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.



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.



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.



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.



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.



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.



Time the journey took



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



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).

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.

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'.

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.