



Your Bus Journey Survey results

Scotland

End of year report 2023



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Foreword



More than 300 million passenger journeys were made by bus across Scotland 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.

Our new survey, Your Bus Journey, enables transport authorities, bus operators and partnerships to monitor the passenger experience. It can also inform 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.

The Government's recent 'Fair Fares Review' (March 2024) commits to increase stability in the bus system. Transport Scotland, working with local government, industry and other stakeholders, will develop a bus service improvement plan and delivery framework over the next 18 months to improve future availability of bus services across Scotland. From our past research this is a key area to improve for existing passengers and to make bus more attractive to potential future bus users.

We use the survey to benchmark results across areas to help determine how and why passenger experience and satisfaction can vary. We would like to thank Transport Scotland for funding Your Bus Journey in Scotland as part of their continued commitment to further understand the passenger experience and to grow bus patronage in Scotland.



About Your Bus Journey



An independent survey

Run by Transport Focus, the independent consumer organisation representing the interests of bus passengers across England outside of London.

We use professional market research suppliers to conduct the survey on the ground, collect and process the responses and analyse the results.

The survey builds on our knowledge and experience of gathering bus passenger feedback since 2010, including trialling the methodology for Your Bus Journey in 2022.

We publish all our survey results, making them transparent and available to transport users, bus operators, transport authorities, Governments and other industry stakeholders.

Measuring actual experiences

Passengers provide their feedback about a single leg of a journey, made on the day of recruitment.

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

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

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

Monitoring and evaluating

The survey produces robust metrics that can be used as targets in improving the delivery of bus services across Scotland.

A consistent survey approach and questions over time and across all participating areas will allow for trend analysis in future years and allows for benchmarking against other areas.

We work to make a difference for all transport users.



Slide 4

DS0 In the opening para we set out our statutory duties on bus (England, outside of London). Feels like we should say something here to note Transport Scotland funding?

David Sidebottom, 2024-07-16T14:13:22.715

RS0 0 See previous slide Transport Scotland funding noted in foreword.

Robert Samson, 2024-07-16T15:05:15.764

Headline results



86 % Overall satisfaction



80% The bus stop



68% Value for money



81% Punctuality



89% The bus driver



77% Waiting time



83% Length of journey

This report presents a summary of the findings from the first year of the survey across the participating regions and operator networks in Scotland.

The range in overall satisfaction scores across the Regional Transport Partnership (RTP)* areas from 80 per cent to 89 per cent indicates a good level of satisfaction but room for improvement in some areas.

This report also 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.

The Scotland-wide results for those factors are opposite but these vary between regions.

• *Please see page 20 for details

What makes a satisfactory or a great journey for fare-payers in Scotland?

Chart A: What makes a satisfactory journey?

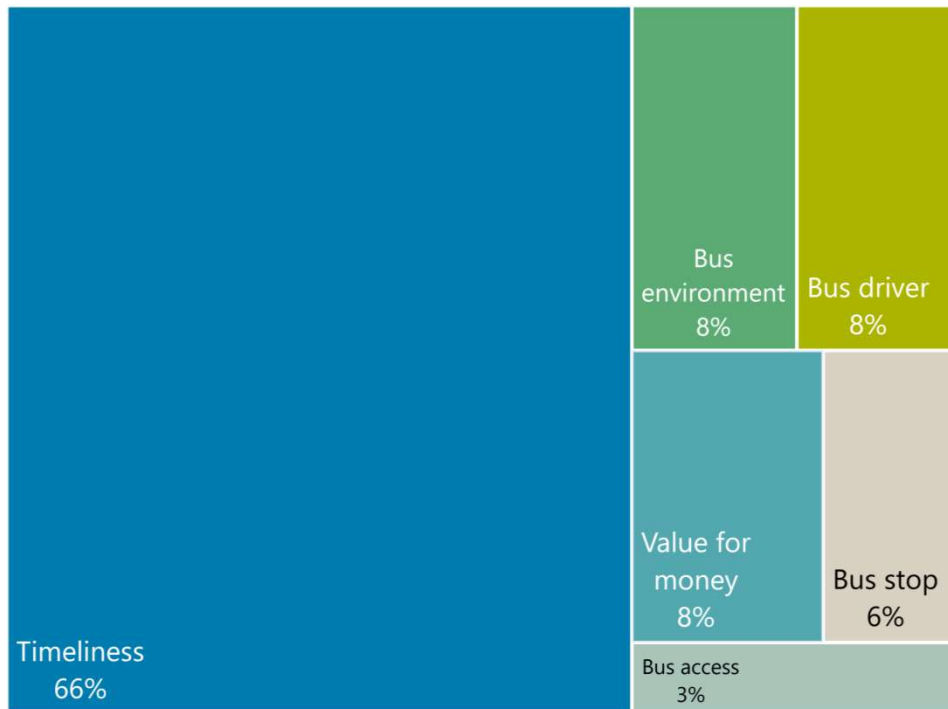
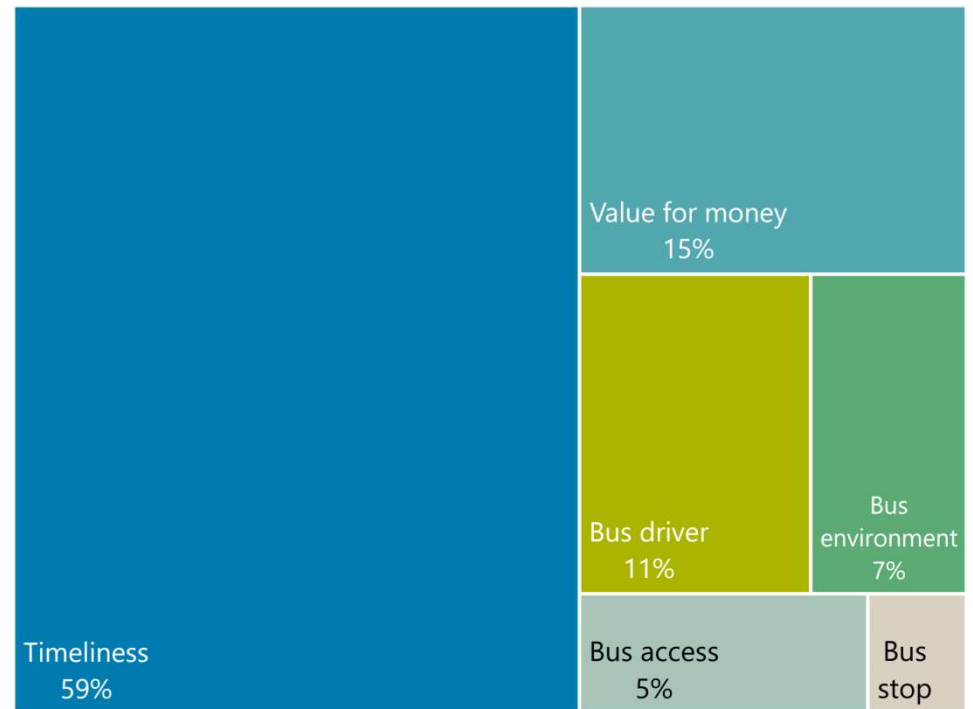


Chart B: What makes a great journey?



- Key driver analysis looks at passengers' overall journey satisfaction response and their response to the 22 individual satisfaction/rating measures in the survey (including value for money for fare-payers), which have been grouped into 6 themes based upon a statistical analysis of the responses.
- Chart A shows which themes most differentiate between those not satisfied and satisfied overall – making a journey 'satisfactory'.
- Chart B shows which themes most differentiate between those fairly and very satisfied overall – making a 'great' journey.

What makes a satisfactory or a great journey for free pass holders in Scotland?

Chart A: What makes a satisfactory journey?

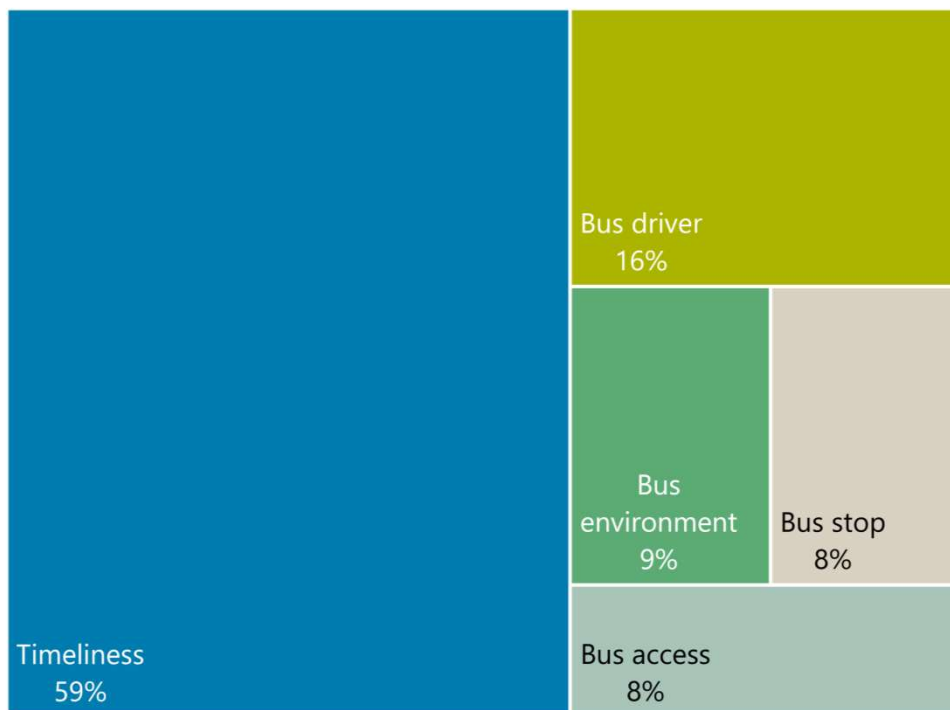
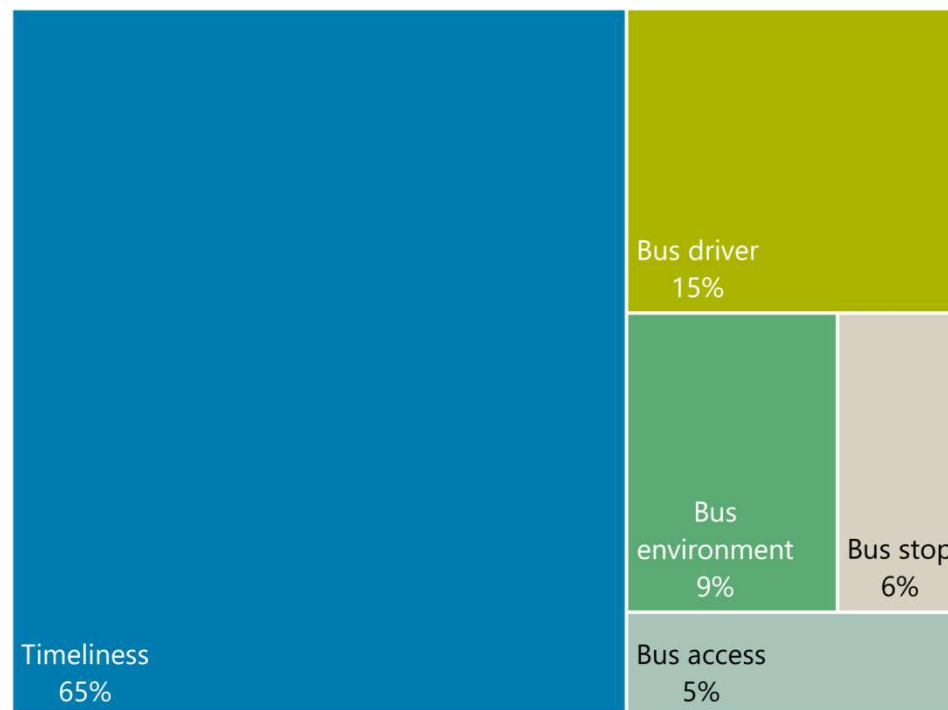


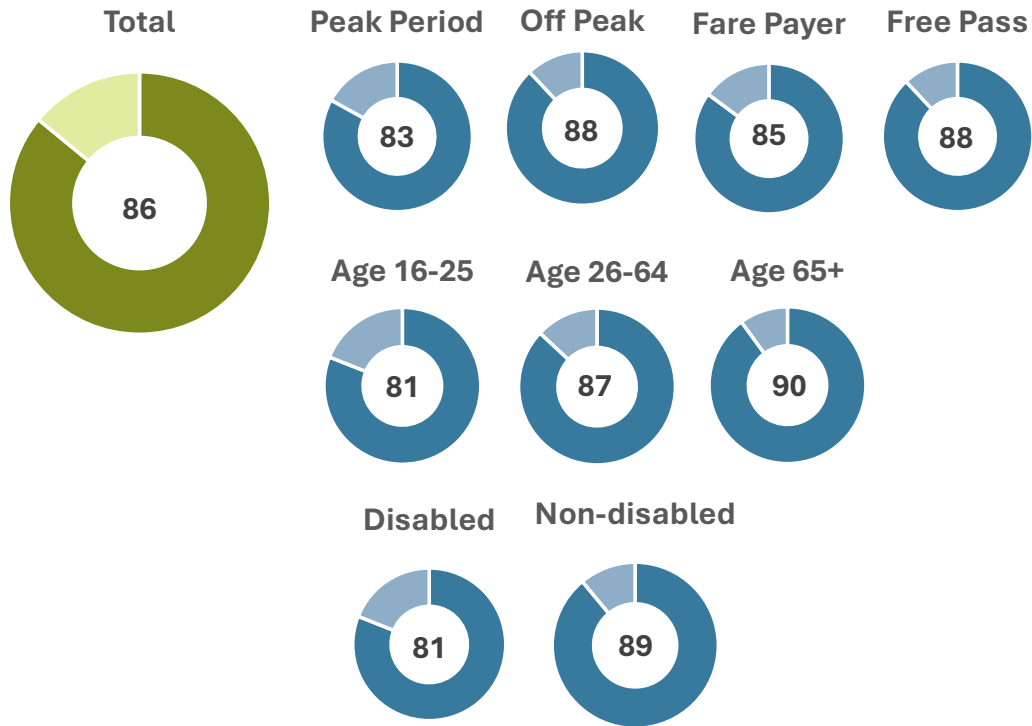
Chart B: What makes a great journey?



- Key driver analysis looks at passengers' overall journey satisfaction response and their response to the 22 individual satisfaction/rating measures in the survey (including value for money for fare-payers), which have been grouped into 6 themes based upon a statistical analysis of the responses.
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Overall satisfaction

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: Full year 2978, Peak 1033; Off Peak 1912, Fare-payer 1290, Free pass 1590, Age 16-25 671, Age 26-64 1522, Age 65+ 768, Disabled 665, Non-disabled 1897

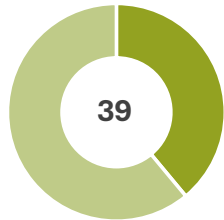
Scotland-wide overall satisfaction at 86 per cent indicates a reasonable level of satisfaction. The key drivers of overall satisfaction are:

- Satisfaction with timeliness (waiting time, punctuality, journey time) is, by a distance, the most important driver of overall journey satisfaction
- Value for money plays a secondary role in driving satisfaction, in particular for making fare-paying passengers ‘very satisfied’
- For those making a free journey, the interaction with, and behaviour of, the bus driver plays the secondary role in generating satisfaction.

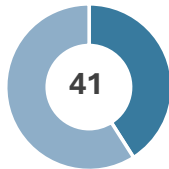


Frequency of bus travel

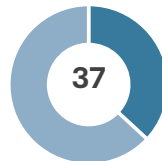
5 or more days per week (%)



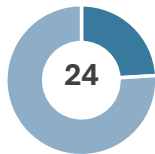
Fare-payer



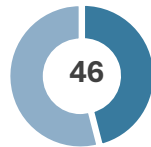
Free pass



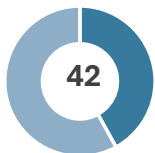
Easy access to car



Difficult access to car

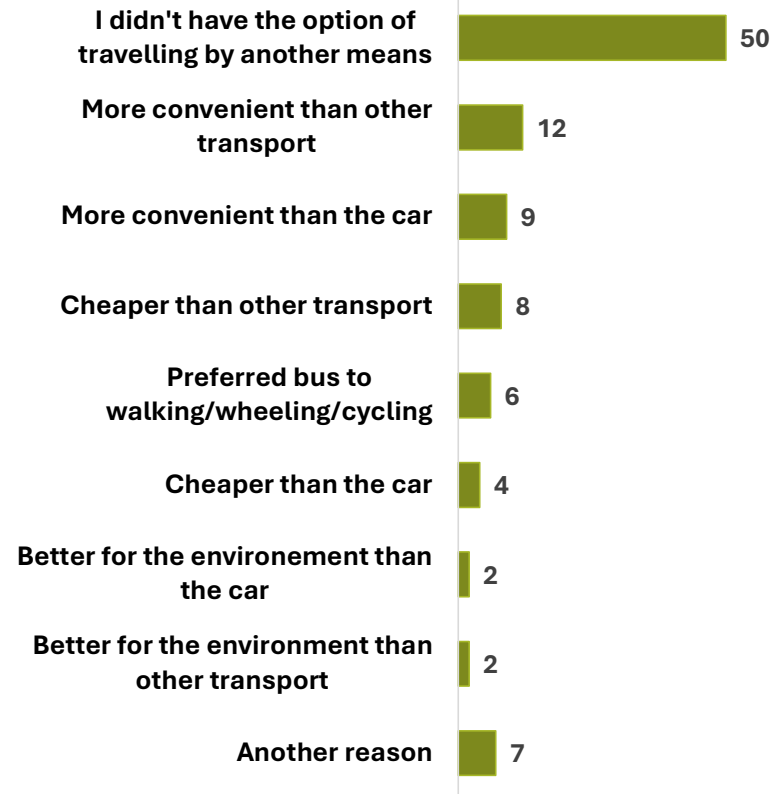


Moderate access to car



- B23 How often do you typically travel by bus?
- Base: Full year 2783 – 2823, Fare-payer 1186 – 1187, Free pass 1497 – 1513, Easy access to car 667 – 668, Moderate access to car 1058 – 1078, Difficult access to car 1012 – 1020

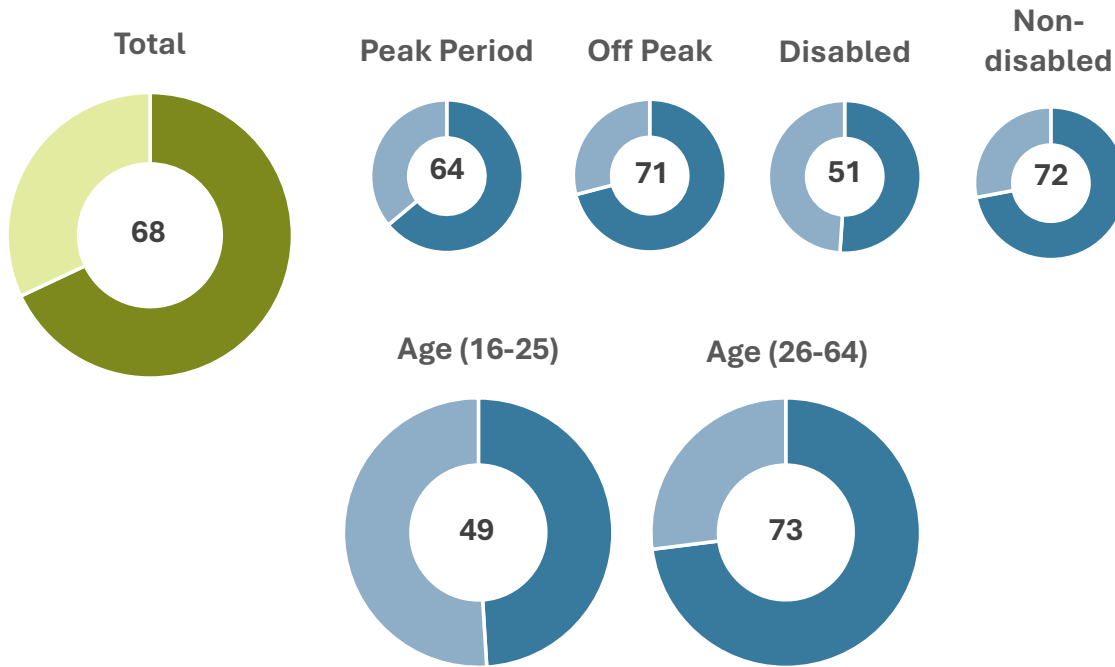
Reason for taking the bus



- B1 What was the main reason you chose to take the bus for that journey? Base: Full year 2939

Value for money

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



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.

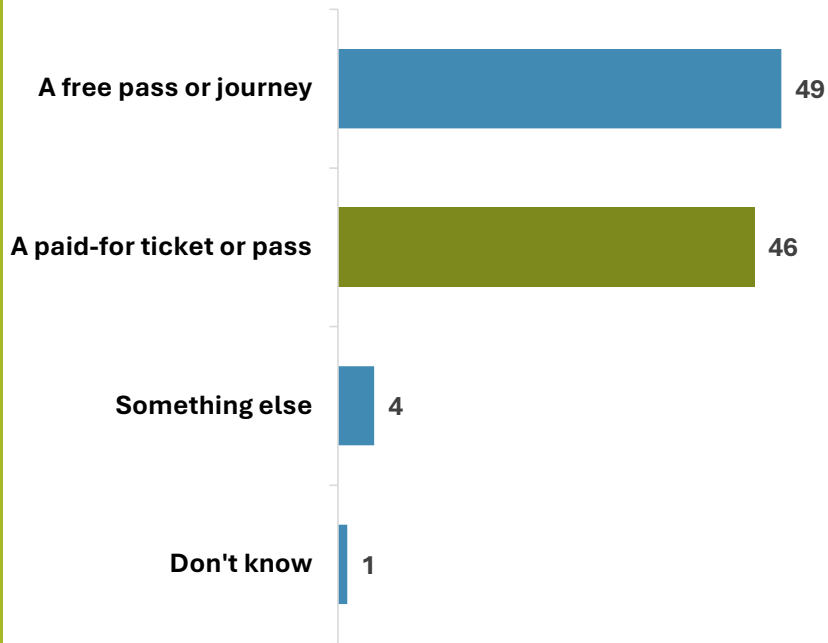
Overall, 68 per cent of fare payers say they are satisfied with value for money, including 28 per cent who are very satisfied.

But this is not the whole picture. The results differ considerably across the 6 regions, ranging from 38 per cent to 76 per cent satisfaction with value for money.

- Q10A How satisfied were you with the value for money of your journey?
- Base: Fare-payers only 1289; Peak 524; Off Peak 754; Age 16-25 193; Age 26-64 1081; Disabled 140; Non-disabled 959

Ticket type

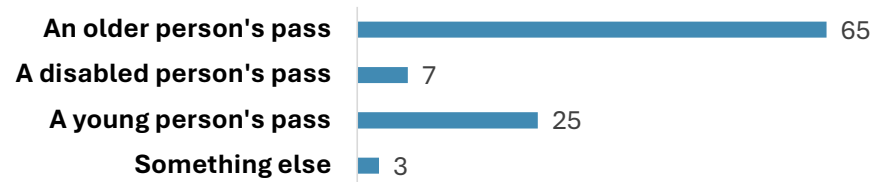
Type of ticket/pass (%)



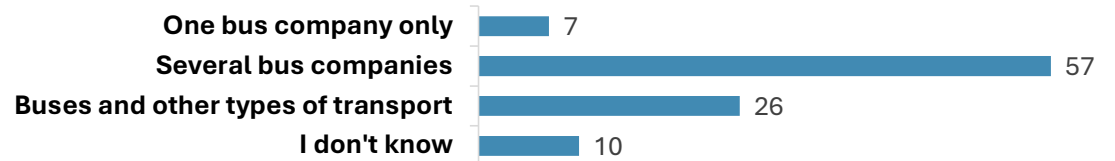
- Q6 What type of ticket or pass did you use for this bus journey?
- B17 Could you tell us a bit more about the pass or ticket you used for this journey? B19 Who could you use your ticket or pass with?
- Base: Full year 3053; Free pass only 1531 - 1531



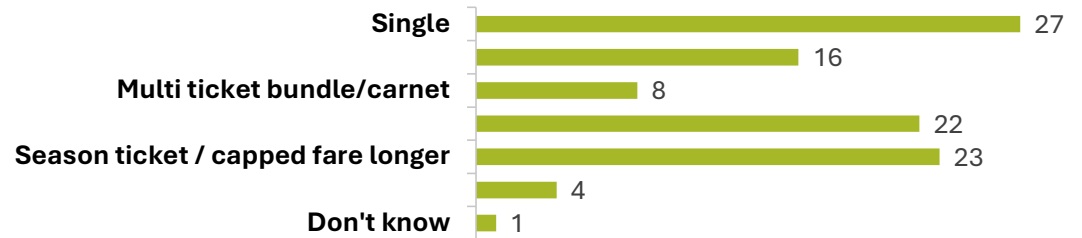
Pass/ticket used (free pass only) (%)



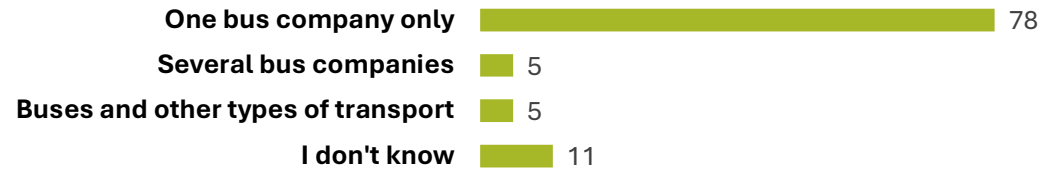
Ticket/pass validity (free pass only) (%)



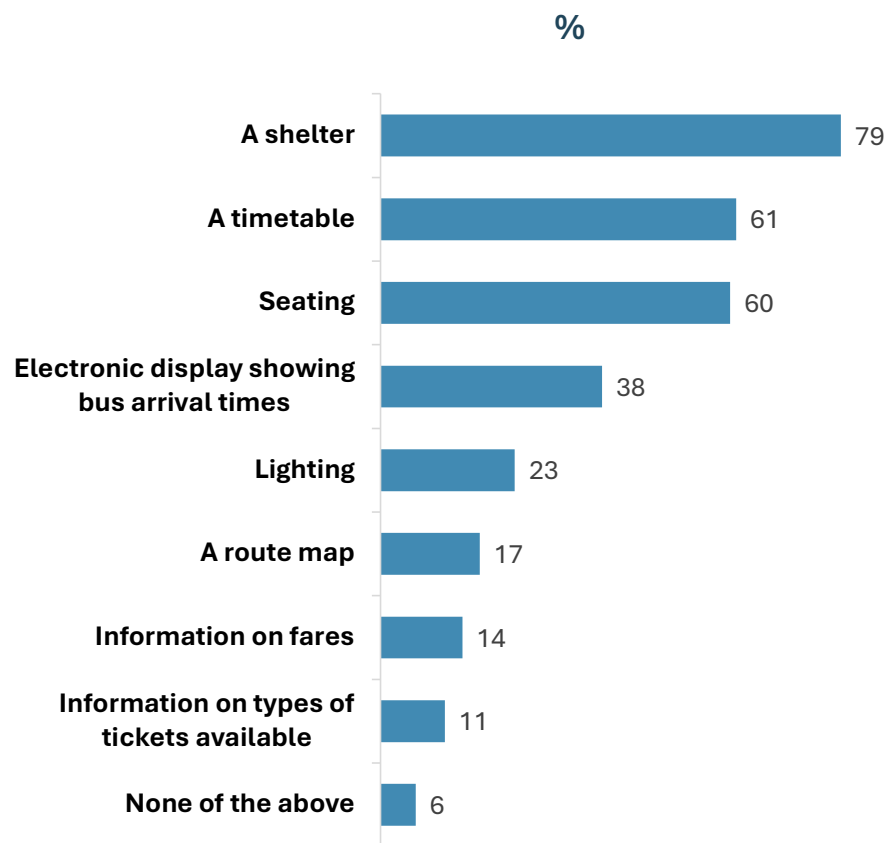
Pass/ticket used (paid journey only) (%)



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



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 72 per cent said that the general condition and maintenance of the bus stop was good, and 80 per cent rated the bus stop 'good' for personal safety. This means that around a quarter of passengers find the bus stop lacking.

Overall, 80 per cent of passengers are satisfied with the bus stop, including 46 per cent who are very satisfied, with a further 6 per cent who are dissatisfied. By region, satisfaction ranges between 75 and 87 per cent.

- B4 Which of these did the bus stop where you caught the bus have?
- Base: Full year 3053

Waiting time and punctuality

Overall, 77 per cent of passengers are satisfied with how long they waited for a bus, which includes 45 per cent very satisfied, with a further 12 percent dissatisfied. Over a third of passengers (37 per cent) reported that they waited less than five minutes for the bus.



Satisfaction with waiting time varies considerably by region from the highest (80 per cent) to the lowest (69 per cent). For an unfortunate four 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.

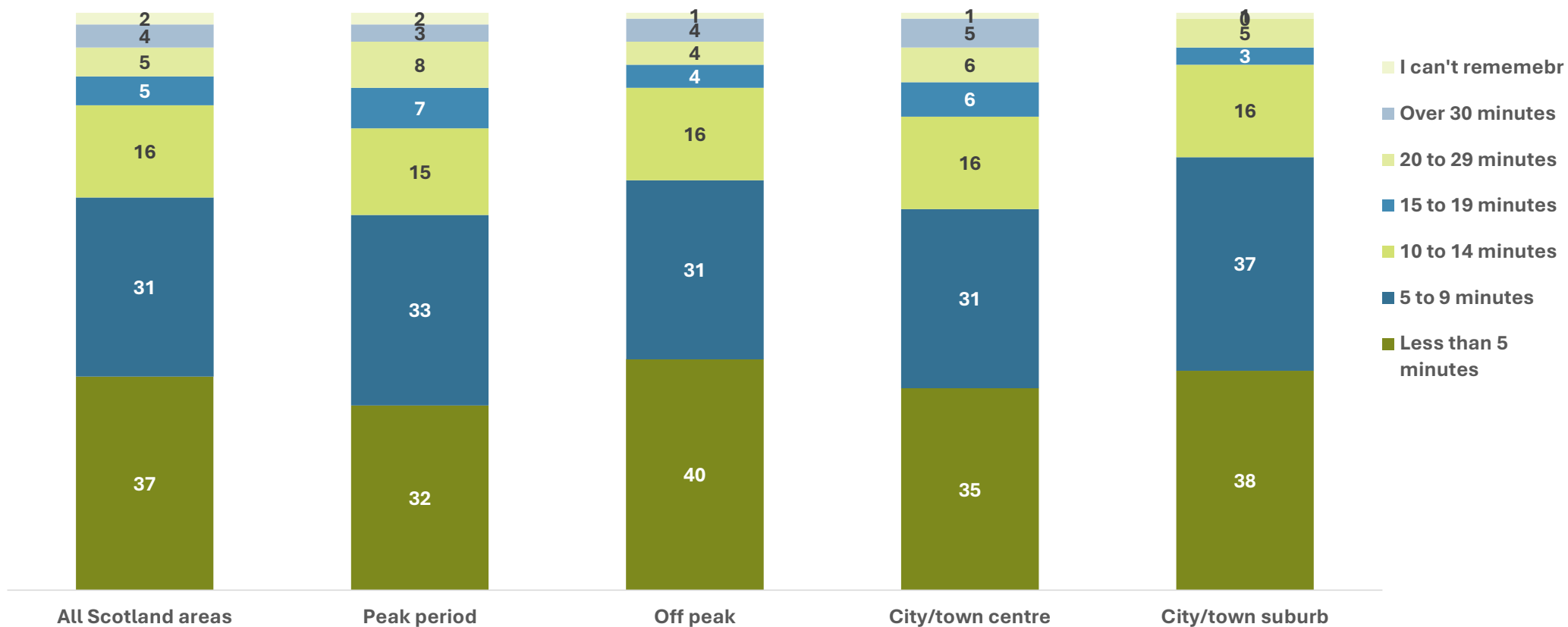
Passengers had complaints about all these factors. Aside from the issue of insufficient scheduling of buses, the source of dissatisfaction for many isn't that there is a wait for the bus as such.

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 quarter of people (23 per cent) in the survey.

Waiting time and punctuality



Length of wait for the bus (%)

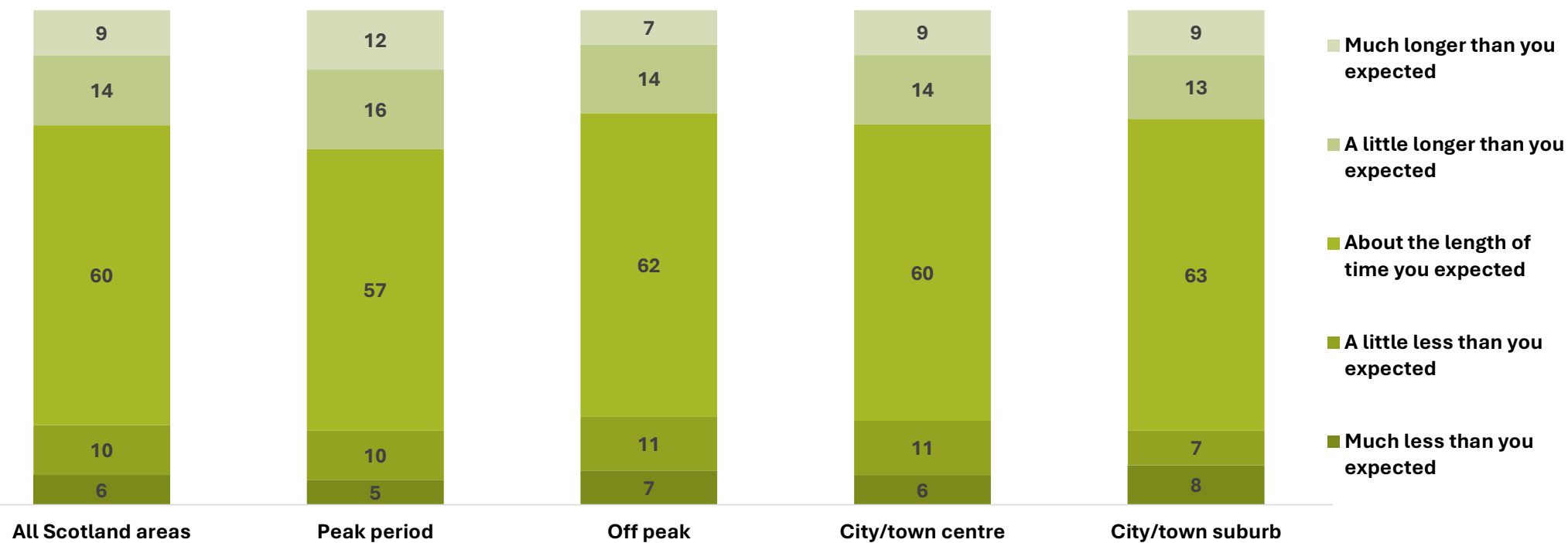


- B6A How long did you wait for your bus? B6B Was this wait time...?
- Base: Full Year 2977; Peak 1027; Off Peak 1911; City/town centre 1712; City/town suburb 710

Wait compared to expectations



How waiting time compared to expectation (%)



- B6A How long did you wait for your bus?
- B6B Was this wait time...?
- Base: Full Year 2938; Peak 1019; Off Peak 1887; City/town centre 1700; City/town suburb 703

The bus driver

The bus driver can make or break a journey. Overall, satisfaction with bus drivers is fairly high at 89 per cent, including 67 per cent who are very satisfied, and with only two per cent who say they are dissatisfied.

Although this does vary across the regions, even the lowest scoring still has a score of 85 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.

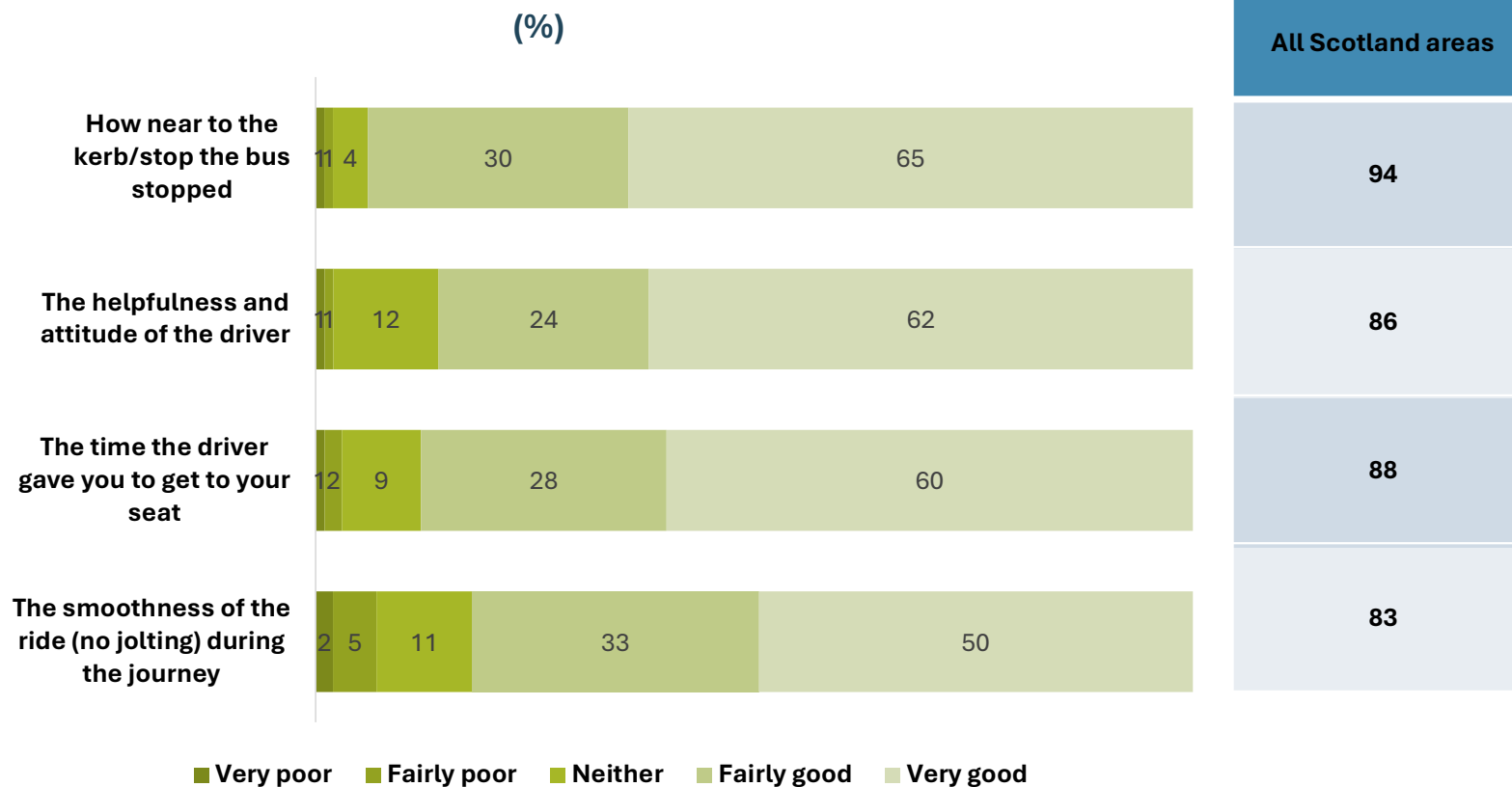
Small courtesies such as waiting until someone is seated before moving off, waiting at a stop if someone is hurrying to catch the bus and helping with buggies, walking aids or luggage can make all the difference.

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.



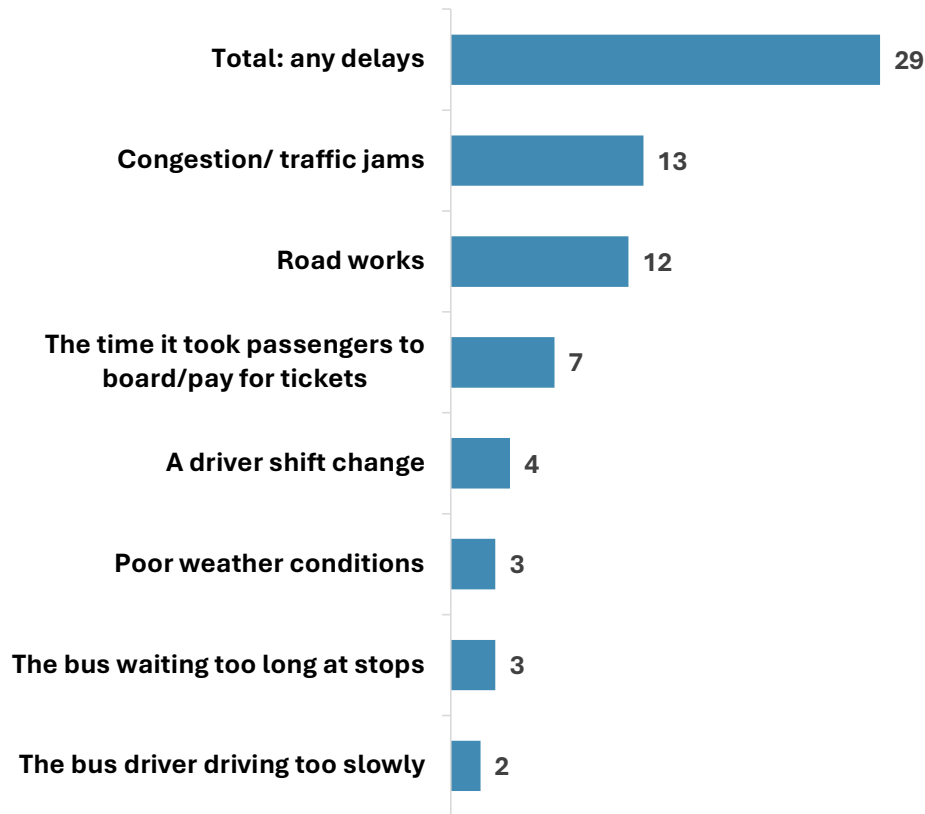
Overall, 86 per cent rate the helpfulness and attitude of the driver as 'good', 88 per cent the time they were allowed to get to their seat after boarding and 83 per cent the smoothness of the ride.

The bus driver



- B16 Thinking about the driver and the driving, how would you rate the following...?
- Base: Interim 872 - 895; Full Year 2708 - 2763

Journey time



In theory, journey time is fixed and should be as it appears on the timetable. However, the reality is different.

Most passengers (83 per cent) are satisfied with the length of time their journey took, including 51 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, 29 per cent of journeys were delayed for one reason or another – primarily congestion (13 per cent).

- B14 Was your journey delayed by...?
- Base: Full Year 3053; Peak 1056; Off Peak 1958

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.

Bad behaviour from other passengers is relatively rare but when it does happen it can be annoying or even frightening and intimidating.

Five per cent of passengers overall say they felt worried or uncomfortable about other passengers' behaviour on the bus, but this is higher, at eight per cent, among younger passengers and among disabled people, at seven per cent.

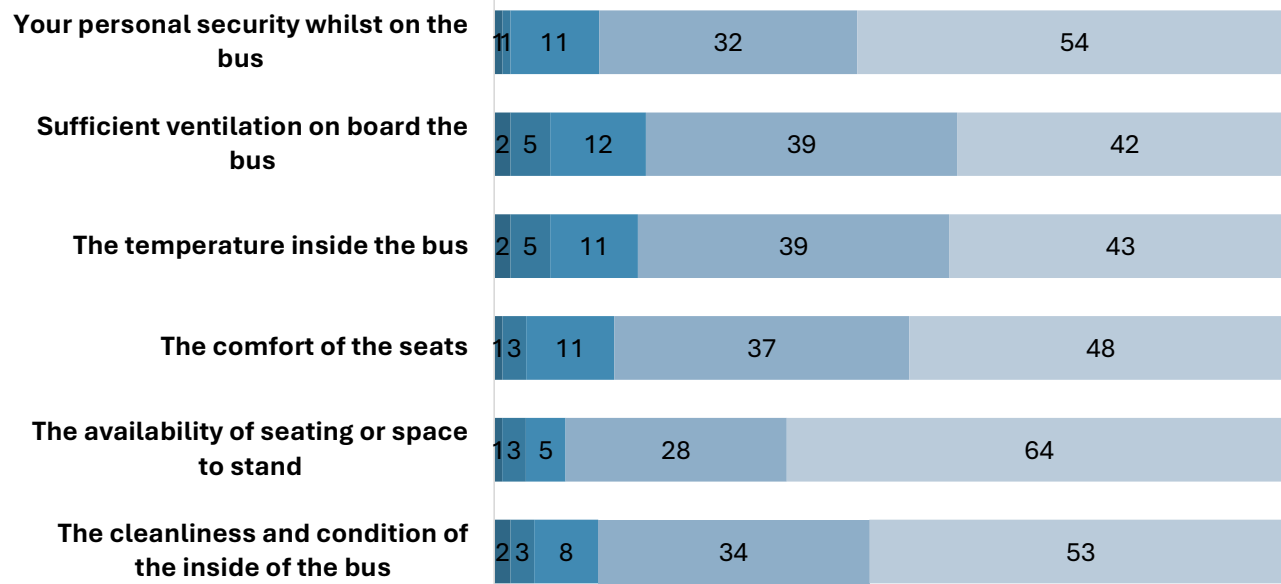


Newer buses can be more comfortable, appear better maintained and offer Wi-Fi and charging points. And electric buses are quieter, which makes for a more pleasant journey.

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.

On board the bus ratings

(%)



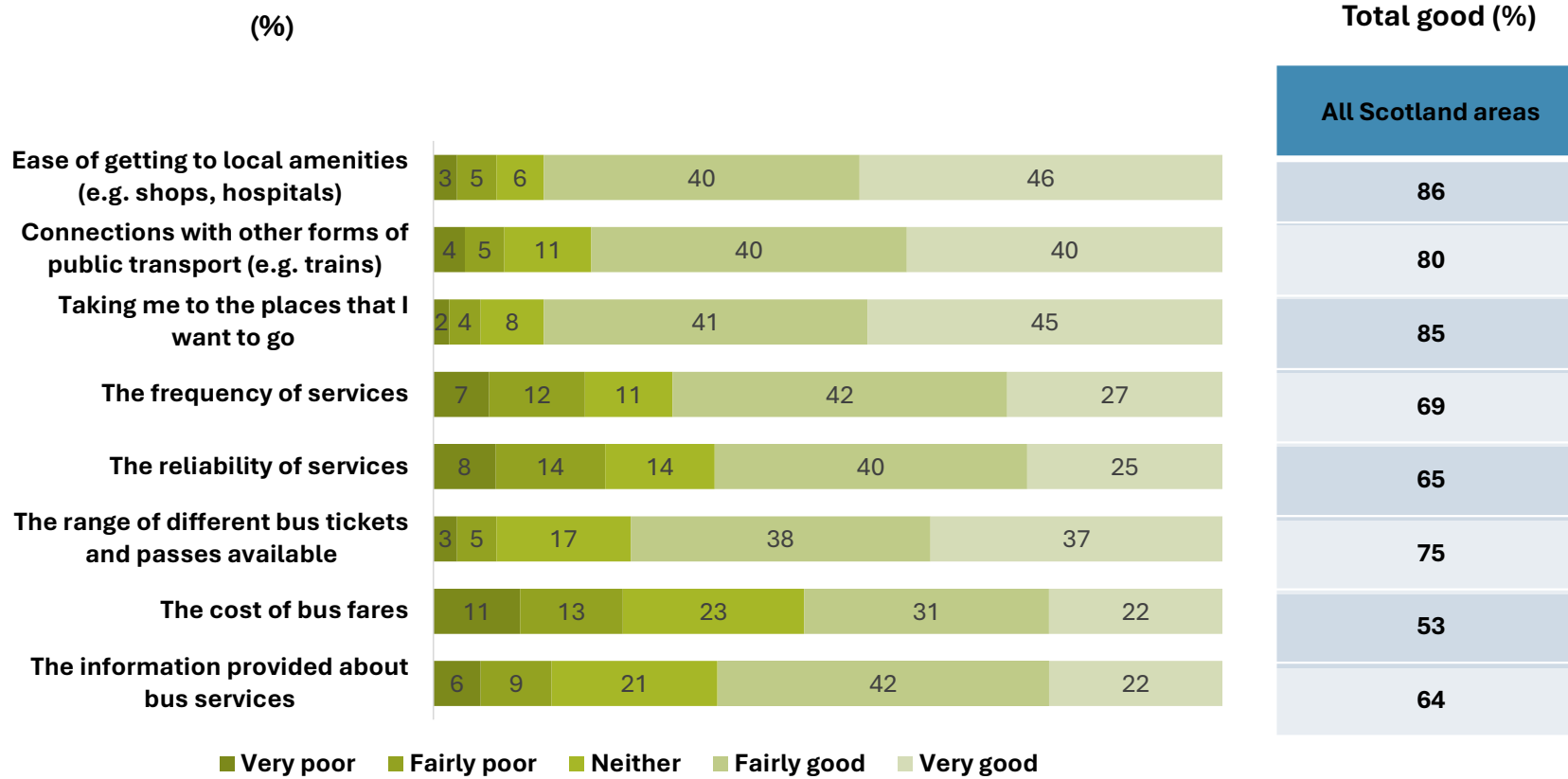
■ Very poor
 ■ Fairly poor
 ■ Neither
 ■ Fairly good
 ■ Very good

Total good (%)

| All Scotland areas | |
|--|----|
| Your personal security whilst on the bus | 87 |
| Sufficient ventilation on board the bus | 81 |
| The temperature inside the bus | 82 |
| The comfort of the seats | 85 |
| The availability of seating or space to stand | 92 |
| The cleanliness and condition of the inside of the bus | 88 |

- B8 Thinking about when you were on the bus, how would you rate the following...?
- Base: Interim 913 - 949; Full Year 2821 - 2895

Ratings for local bus services in general



- 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: Interim 626 - 866; Full Year 1825 - 2672

Results by region – overall journey satisfaction



| Overall journey satisfaction | | |
|------------------------------|--|-----------|
| Rank | Regional transport partnership name | Satisfied |
| 1 | Strathclyde Partnership for Transport (SPT) | 89% |
| 2 | South West of Scotland Transport Partnership (SWesTrans) | 87% |
| 3 | South East of Scotland Transport Partnership (SESTran) | 86% |
| 4 | Tayside and Central Scotland Transport Partnership (TaCTran) | 83% |
| 5 | Highlands and Islands Transport Partnership (HITRANS) | 80% |
| 6 | Regional Transport Partnership for Aberdeen and Aberdeenshire (Nestrans) | 80% |

Results by region – value for money (fare payers only)



| Satisfaction with value for money (fare -payers only) | | |
|---|--|-----------|
| Rank | Regional transport partnership name | Satisfied |
| 1 | Strathclyde Partnership for Transport (SPT) | 76% |
| 2 | South West of Scotland Transport Partnership (SWesTrans) | 71% |
| 3 | South East of Scotland Transport Partnership (SESTran) | 68% |
| 4 | Tayside and Central Scotland Transport Partnership (TaCTran) | 54% |
| 5 | Highlands and Islands Transport Partnership (HITRANS) | 54% |
| 6 | Regional Transport Partnership for Aberdeen and Aberdeenshire (Nestrans) | 38% |

Conclusion



The *Your Bus Journey* survey has established a new benchmark for bus passenger satisfaction. The survey highlights variations across the country.

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 nine per cent between the highest and lowest performing areas for overall satisfaction, to a difference of 38 per cent for value for money.

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.

Key information about the survey and this report

Fieldwork

Passengers aged 16 years or older are approached at bus stops and on-board buses and asked if they would like to take part in the survey about the journey they are making.

Passengers complete the survey themselves, using either an online or paper questionnaire.

Fieldwork is ongoing across the year and fieldwork is spread evenly to give a full view of bus travel in each area.

The survey was conducted in six Regional Transport Partnership areas: HITRANS (mainland), Nestrans, SEStran, SPT, SWestrans and Tactran.

This report covers the first full year of research, with fieldwork running from late January to mid-December.

Data

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 to ensure there is a 50:50 split in all areas. Data is based on journeys rather than passengers, so frequent users are more likely to be sampled.

All data in this report is for All Scotland areas unless otherwise stated.

Only data with a base size of over 75 respondents has been shown. Please note that lower base sizes (below 100) should be treated with caution.

Figures are rounded, so may not add up to 100%. For ratings questions, responses are based on those that gave an option (excluding don't know) unless otherwise stated.

Definitions

In total, across the Scotland areas, 3053 responses were received.

Throughout the report, we refer to 'off peak' and 'peak' travel. Peak travel is defined as weekdays between 7:00-9:29am and 3:30-6:29pm.

The 'All Scotland areas' total refers to all areas taking part in the survey within Scotland.

This total is weighted average scores that take account of the number of bus journeys that take place in each area.

Total satisfied scores combine responses for 'very' and 'fairly' satisfied, likewise for Total good scores.

Questions that form the themes used in 'Key driver analysis'



| Individual questions | Bus driver | Bus environment | Bus stop | Timeliness | Bus access | Value for money |
|--|------------|-----------------|----------|------------|------------|-----------------|
| Rating the bus driver: helpfulness/attitude | X | | | | | |
| Rating the bus driver: time to get to seat | X | | | | | |
| Satisfaction with bus driver overall | X | | | | | |
| Rating the bus driver: smoothness/freedom from jolting | X | | | | | |
| Rating the bus driver: nearness to kerb/stop | X | | | | | |
| Rating: Temperature inside the bus | | X | | | | |
| Rating: Ventilation on board the bus | | X | | | | |
| Rating: Comfort of the seats | | X | | | | |
| Rating: Cleanliness and condition inside bus | | X | | | | |
| Rating: Personal security on the bus | | X | | | | |
| Rating: Bus stop general condition/std of maintenance | | | X | | | |
| Rating: Bus stop being clear of litter | | | X | | | |
| Rating: Personal safety at the bus stop | | | X | | | |
| Rating: Info provided at the bus stop | | | X | | | |
| Satisfaction with waiting time | | | | X | | |
| Satisfaction with punctuality | | | | X | | |
| Satisfaction with length of journey | | | | X | | |
| Satisfaction with boarding bus stop overall | | | | X | | |
| Rating: Time taken to board bus | | | | | X | |
| Rating: Ease of getting on bus | | | | | X | |
| Rating: Availability of seating or space to stand | | | | | X | |
| Satisfaction with value for money (fare -payers only) | | | | | | X |

Contact information



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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