LondonTravelWatch

The voice of transport users

Bus passengers' priorities for improvement in London

March 2016

London TravelWatch is the independent, multi-modal body set up by Parliament to provide a voice for London's travelling public. This includes users of rail services in and around London, all Transport for London (TfL) services (bus, Tube, DLR, trams, taxis) and motorists, cyclists and pedestrians using London's strategic road network. We are funded by and accountable to the London Assembly.

Our approach
- We commission and carry out research, and evaluate and interpret the research carried out by others, to ensure that our work is based on the best possible evidence
- We investigate complaints that people have been unable to resolve with service providers – we get more than 6,000 enquiries a year from transport users and in 2014-15 we took up 2,300 cases with the operator because the original response the complainant had received was unsatisfactory
- We monitor trends in service quality as part of our intelligence-led approach
- We regularly meet with and seek to influence the relevant parts of the transport industry on all issues which affect the travelling public
- We work with a wide range of public interest organisations, user groups and research bodies to ensure we keep up to date with passenger experiences and concerns
- We speak for the travelling public in discussions with opinion formers and decision makers at all levels, including the Mayor of London, the London Assembly, the Government, Parliament and local councils.

Our experience of using London's extensive public transport network, paying for our own travel, and seeing for ourselves what transport users go through, helps ensure we remain connected and up to date.

Our aim is to press in all that we do for a better travel experience for all those living, working or visiting London and its surrounding region.
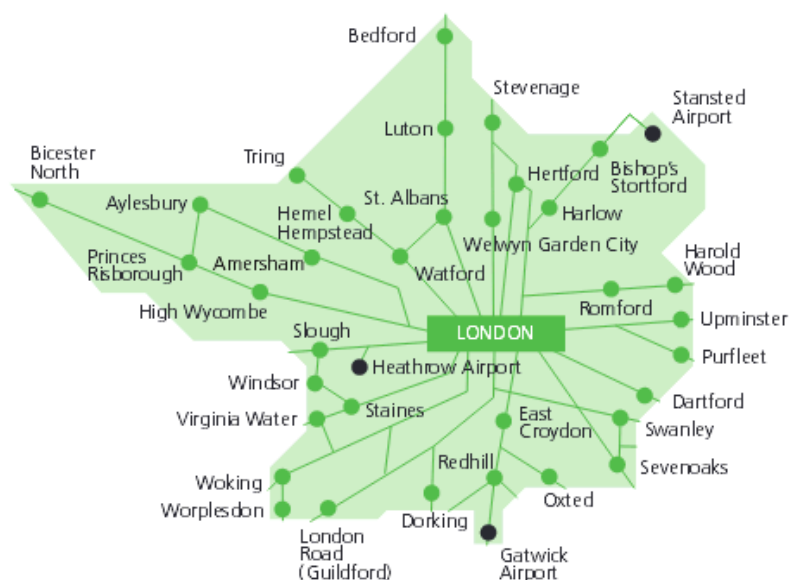
Foreword

London's buses carry more passengers than the Underground and National Rail together. They serve the whole of Greater London, and beyond. They operate round the clock and are accessible to all. Buses are an indispensible part of the capital's social and economic infrastructure and they are far more space efficient than any other mode.

Therefore it is not a surprise that our latest survey of London's bus passengers finds 87% of London bus passengers agreed that having a good bus network is important to their local area.

Most of the results reinforce what we have found before. Passengers want their buses to arrive on time and run on time. There has been one substantive change since 2010 when we last surveyed passengers: the issues of value for money, affordability and the cost of the fare are now more important to passengers.

Passengers are generally satisfied with the bus services provided by Transport for London and trust them to run their bus services. However, they want to see improved performance and better value for money. Other top priorities for improvement are:

- for more to be done to tackle anti-social behaviour
- higher frequencies
- more buses going where they want to go
- more bus stops with next bus displays, (this is despite there being a high level of smartphone ownership).

This is an interesting survey which provides some insight into what passengers want, levels of trust in their operator and what might be done to get more people using the bus. We will use the results in our work to press for continuous improvement now. I hope others find it useful.

Stephen Locke
Chair

Contents

1   Executive summary and key recommendations

This research shows that the main concern of passengers is that their buses should arrive on time and run to time. Although the methodology has changed, since our last survey five years ago, it seems that value for money, affordability and the cost of a fare have become more important to passengers. The cost and affordability of bus services comes out as the top suggestion to get more people to use the bus.

There is overwhelming support for bus services in London. When asked about the importance of the bus service 87% of bus passengers agree buses are important to their local area, with 53% strongly agreeing. Overall bus passengers in London are satisfied with their bus services.

This survey also asked questions designed to understand whether bus passengers trust their operator. It finds that trust in the operator is high with 71% scoring five or more on a scale of one to seven. However, the score is relatively low in response to questioning about whether the operator cares what passengers think.

A small number of responses from London passengers differ markedly from those outside London. More London passengers agree that their operator uses technology well. There is a higher proportion of work-related journeys by Londoners, whereas outside London shopping trips are most significant. London's bus passengers are less inclined to agree that their bus operator welcomes contact from them. However, a greater proportion believe their operator is more honest with them when there are problems.

There are some differences in the views of fare payers compared to concessionary fare passengers. Value for money is the number one priority for fare-paying passengers, but only ninth for concessionary fare passengers. For fare paying passengers, Wi-Fi gets into the top 10 priorities for improvement whereas for concessionary fare passengers it is 26th, probably reflecting the demographic differences and the ownership of smartphones. Allowing more time for passengers to take their seats is important for concessionary fare passengers, but less so for fare paying passengers.

It is clear that bus passengers really value their services and that overall they are satisfied. However, the importance of the bus service to Londoners means that services must be continually improved. Looking ahead, to the loss of revenue support for bus services in London, it is clear that more needs to be done to reduce operating costs and fares.

2 Introduction and methodology

The main objective of this research was to measure bus passengers' priorities for improvement and trust in local bus services. The study was conducted by Populus using an online methodology, with the sample drawn from Populus' proprietary online panel of 100,000+ members.

All fieldwork for the research was conducted online between 7th and 27th October 2015 with an average interview length of 20 minutes.

Transport Focus commissioned the survey and has published its report looking at bus passengers and non-bus passengers in England, outside London. Their report can be found at:
http://www.transportfocus.org.uk/news/articles/do-passengers-trust-the-bus

This report, published by London TravelWatch, focuses on the responses from London bus passengers. Where there is a marked difference between the London sample and the England, outside London sample, this is commented upon. Similarly, where there are differences between the responses of fare payers and concessionary fare passengers these are highlighted. However, there should be some caution in these comparisons, as the number of concessionary fare passengers is low.

2.1 Overview of sample design

The Bus Passenger Priorities research is based on a two stage sample design. Firstly, from the 100,000 panel, a nationally representative sub-sample of 6,012 online adults aged over 16 was selected. They completed the online questionnaire. This first wave of interviewing achieved 635 bus users in London, 2,960 bus users in England outside London, and 2,382 infrequent/non-users England outside London.

Part of the research requirement was to achieve a robust sample size of bus users for each Public Transport Executive (PTE) area, so further panellists were asked the same questions (regionally targeted) to achieve over 400 in each PTE (and Bristol area). This added a further 1,704 boost interviews amongst bus users. The overall sample size was: 635 bus users in London, 4,664 bus users in England outside of London, and 2,382 infrequent/non-users outside of London.

2.2 Nationally representative sample of England

The sample design was based on setting representative England population quotas on: age within gender, region and social grade. The quotas are taken from the very large National Readership Survey, a random probability face-to-face survey conducted annually; it is an accepted research industry source to set a population survey quota.

The quotas used are shown in the table below:

Sex		Sex	
Male	**49%**	**Female**	**51%**
Age and gender (male)		**Age and gender (female)**	
18 - 24	12%	18 - 24	12%
25 - 34	17%	25 - 34	17%
35 - 44	19%	35 - 44	19%
45 - 54	17%	45 - 54	17%
55 - 64	15%	55 - 64	15%
65+	20%	65+	20%
Region		**Social grade**	
North East	5%	AB	27%
North West	14%	C1	29%
York & Humber	10%	C2	21%
East Midlands	9%	DE	22%
West Midlands	11%		
Eastern	11%		
Greater London	15%		
South East	15%		
South West	11%		

Transport Focus has undertaken further analysis of the responses. This included two statistical exercises; a key driver analysis and a maximum differential (MaxDiff) analysis. These techniques are expanded on below:

Key driver analysis was applied to understand what drives passenger trust in bus companies. The technique used was called True Drivers Analysis – this produced a share of impact score for each of the 17 attitudinal statements against overall trust.

Maximum Difference Scaling (MaxDiff) is a way of evaluating the importance (or preference) of a number of alternatives. It is a discrete choice technique where respondents are asked to make simple best/worst choices. Within the bus priorities interview respondents were asked to complete a series of trade off exercises. In each exercise they are presented with five items (from 31) and asked to choose which are the most important and the least important to them in the context of improvements to bus services. Statistical analysis at the data stage was used to generate preference scores.
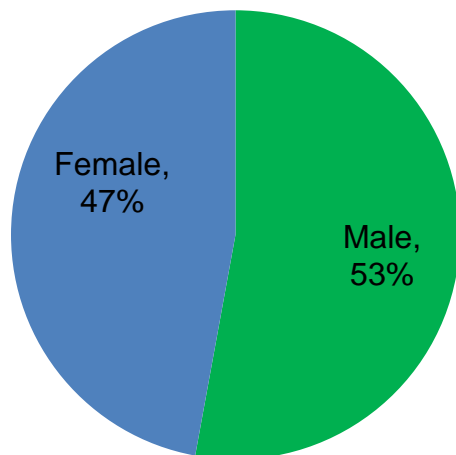
3   Passenger profile

This chapter provides an insight into the characteristics of the respondents and the types of bus journeys they are taking.
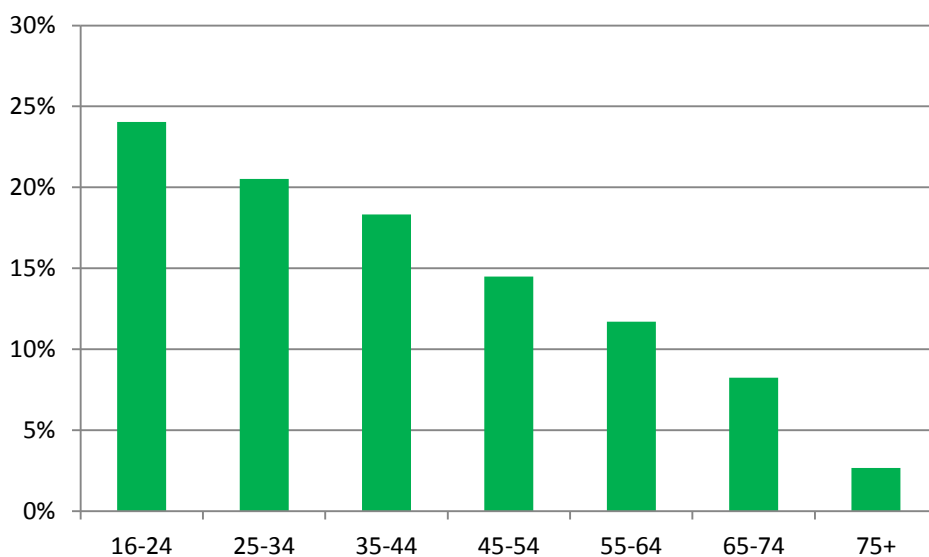
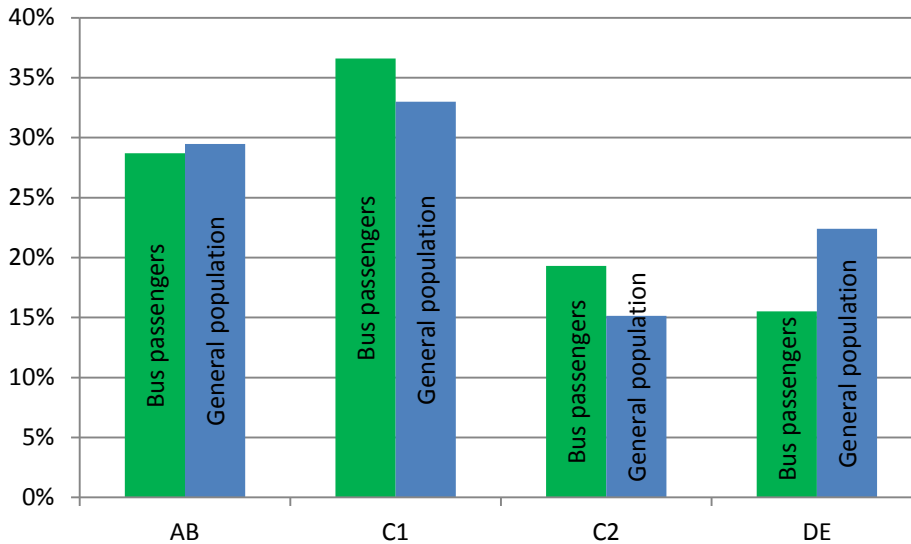## 3.1 Gender

53% of bus passengers are male, 47% female.

3.2 Age

The largest group of passengers were aged between 16 and 24. More than half (62%) were under 44 and only 11% above 65.

3.3 Social grade

The social grade of London's bus passengers is very similar to that of the general population – everyone in London uses the bus.

The green bars represent the percentage (approximated social class) of London bus passengers. The blue bars represents the general population (Census 2011). Please note that not all of the bus passengers are Londoners.

3.4 Fare payer or Freedom Pass holder

80% of bus passengers pay for travel, 20% are Freedom Pass holders.
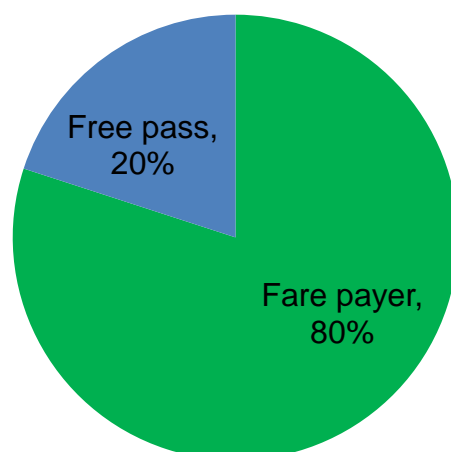
3.5 How frequently do bus passengers use the bus?

The survey defines a bus user (as distinct from a non-bus user) as one that travels by bus at least once every three months. 63% of bus passengers use the bus at least once a week.
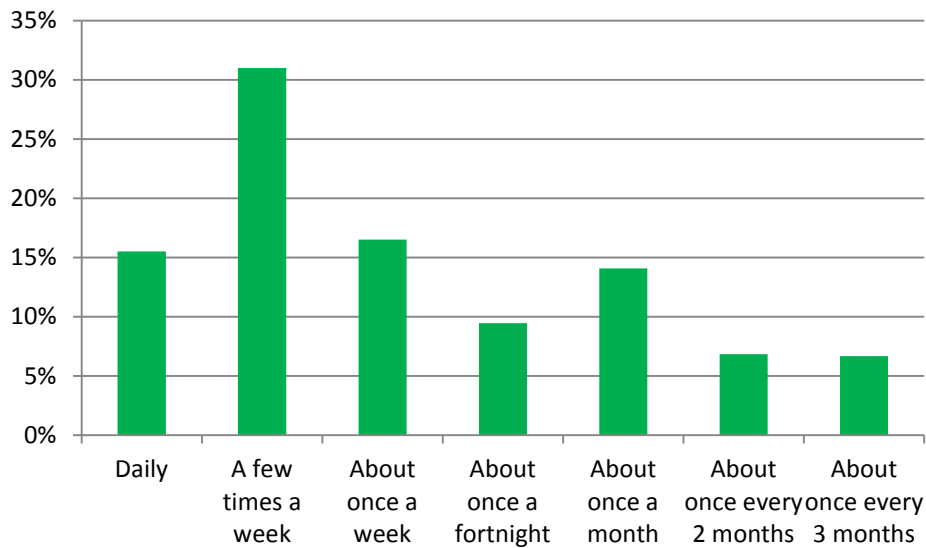
3.6 Journey purpose

The main reason for using the bus in London is for getting to work, whereas outside London it's shopping trips.
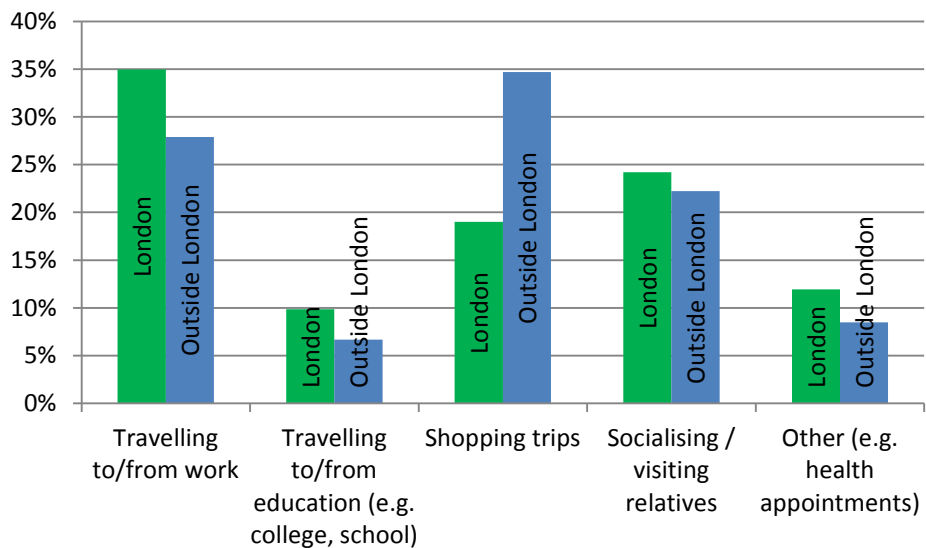
Passengers, of course, use the buses for other reasons. (More than one response could be made to this question.)
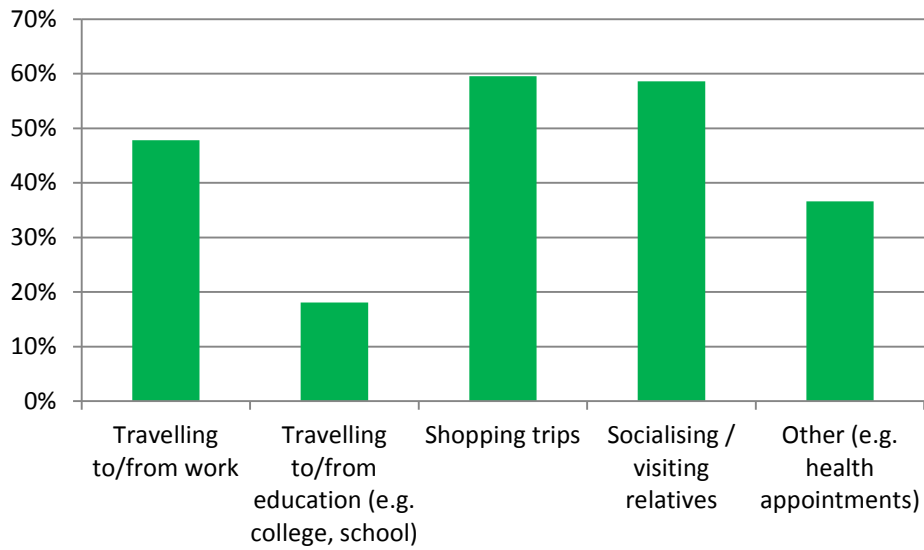
3.7 Ownership of smartphones and other devices

Levels of ownership of smartphones are very high for passengers at 87% of London bus passengers generally and 70% of concessionary fare passengers.
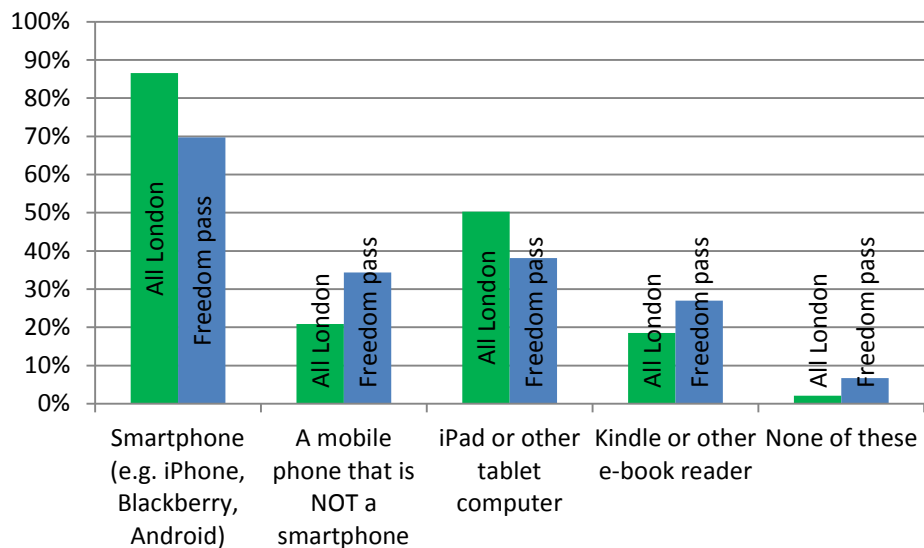
3.8 Passengers that have a condition or illness that has an adverse affect on their ability to make journeys by bus

7.5% of passengers with a disability said that their condition had an adverse impact on their ability to make journeys by bus. (Note: only those with a disability were asked this question and 87% did not respond.)
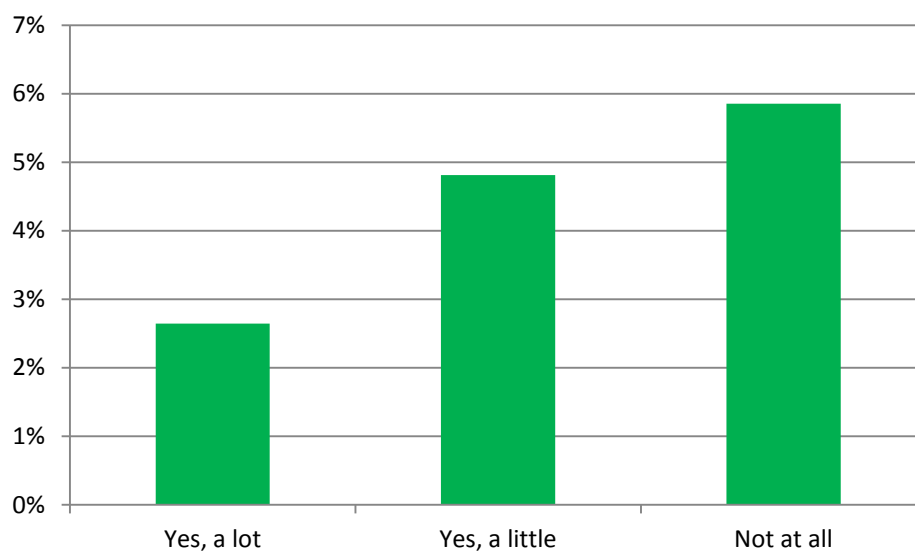
4   Bus passenger satisfaction

This chapter explores passenger satisfaction with London's bus services.

4.1 Overall satisfaction

When asked to score overall impression on a scale on one to seven, where one is really bad and seven really good, 78% score five or more.
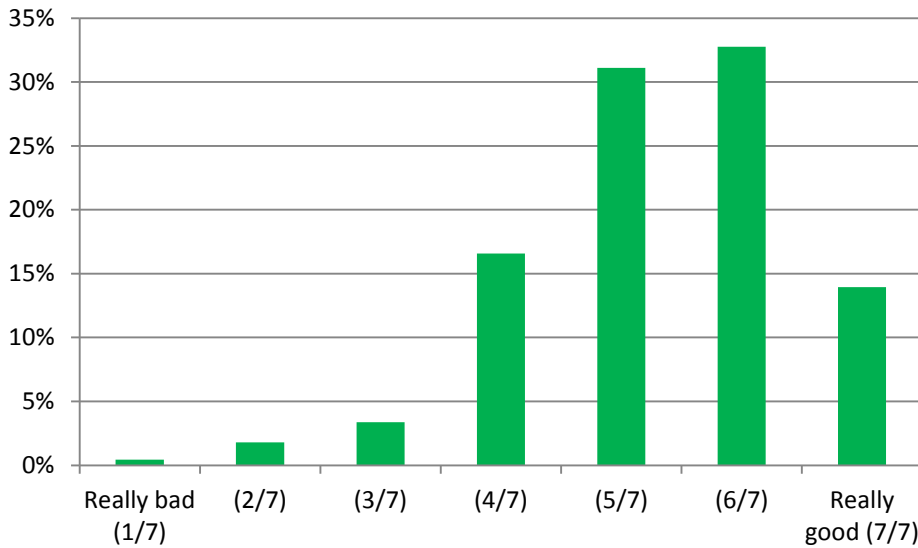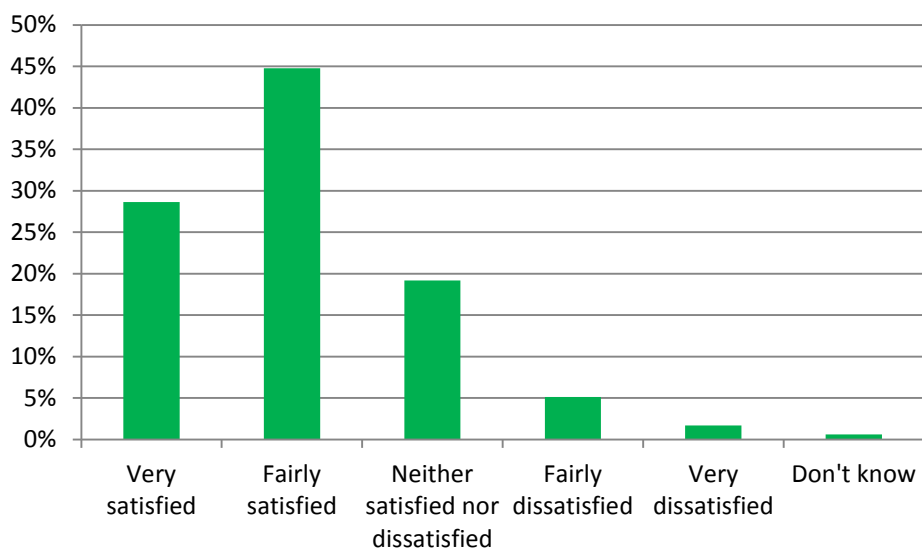

4.2 Do buses go when and where respondents need them to go?

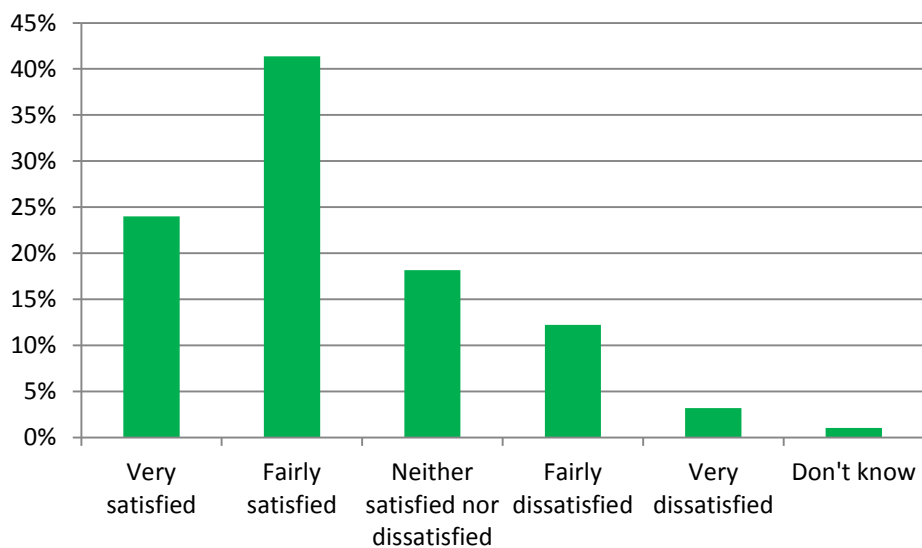77% of passengers are very or fairly satisfied that their bus services go when and where they want them.
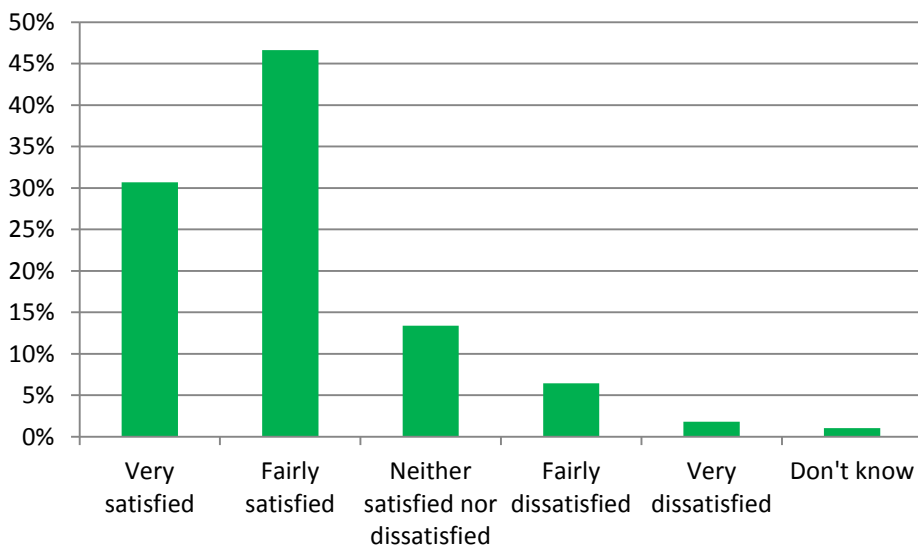
4.3 Bus stops

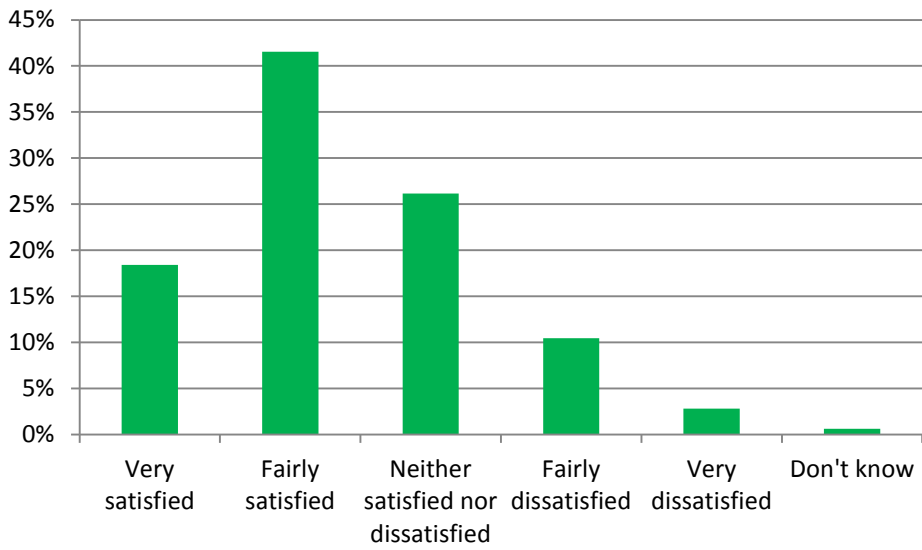73% of passengers are very or fairly satisfied with the bus stops they use.

4.4 Buses arriving on time

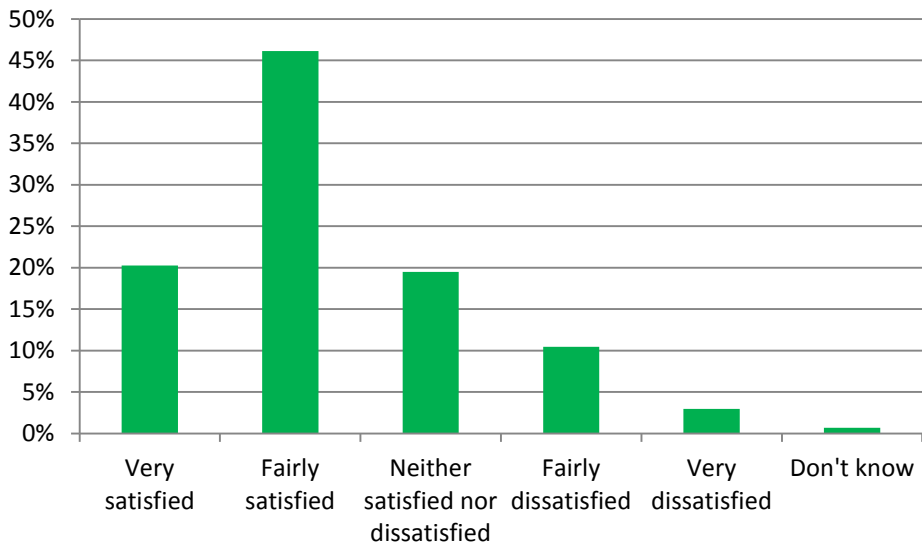65% of passengers are very or fairly satisfied that their buses arrive when they should do.

4.5 How pleasant is the journey?

60% of passengers are satisfied that their journey is pleasant.
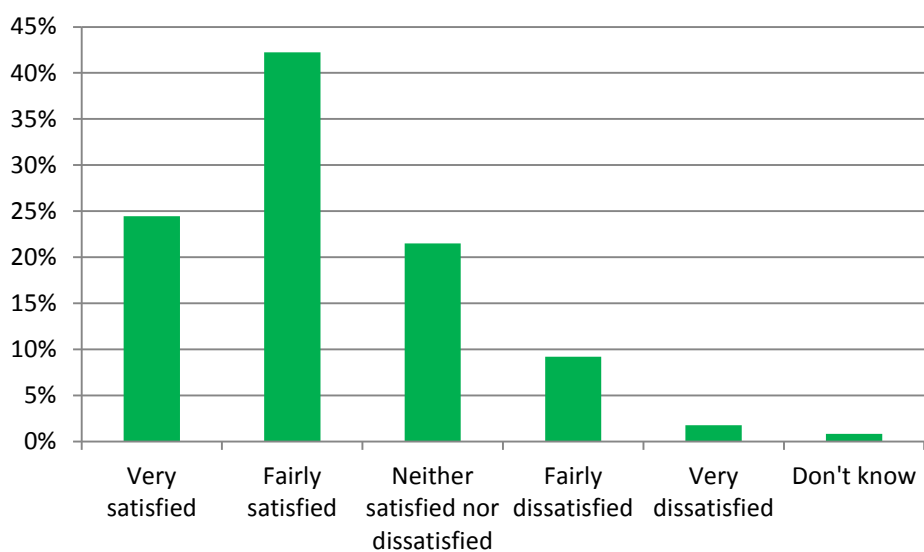

4.6 How satisfied are passengers with journey times?
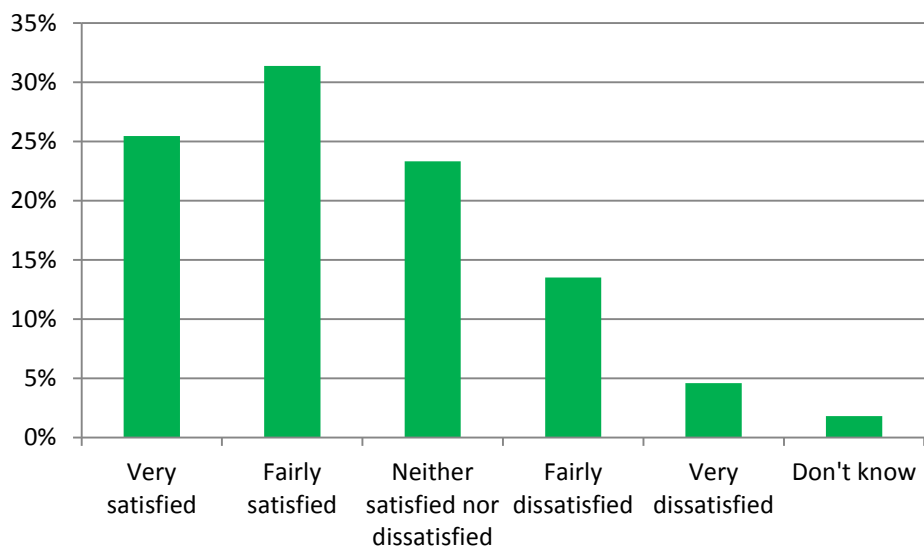
66% of passengers are satisfied with journey times.

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4.7 How satisfied are passengers with their bus drivers?

67% of passengers are satisfied with their bus drivers.

4.8 How satisfied are passengers with the value for money they get?

57% of passengers are satisfied with the value for money they get.

4.9 How satisfied are passengers with the range of tickets available?

The response to this question is interesting insofar as only 46% of passengers are satisfied with the range of tickets available and 14% responded that they 'don't know'.
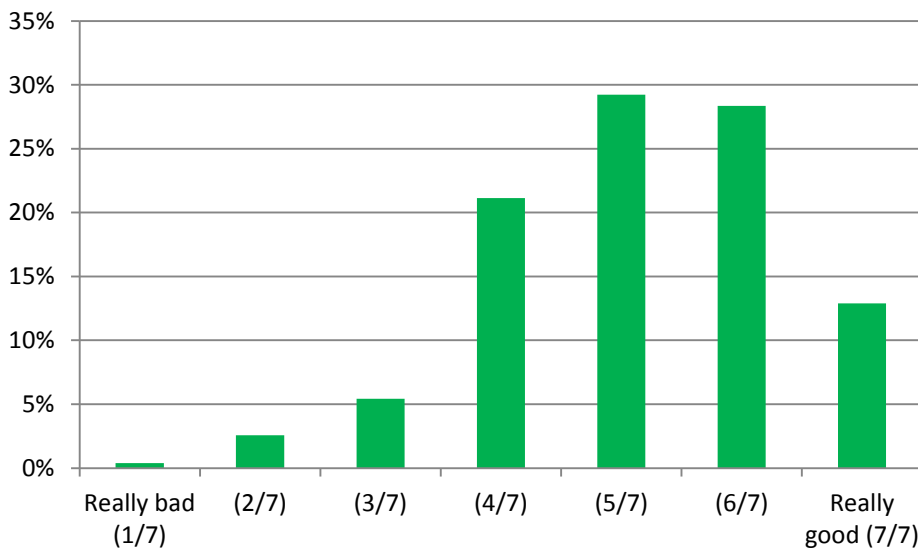
www.londontravelwatch.org.uk
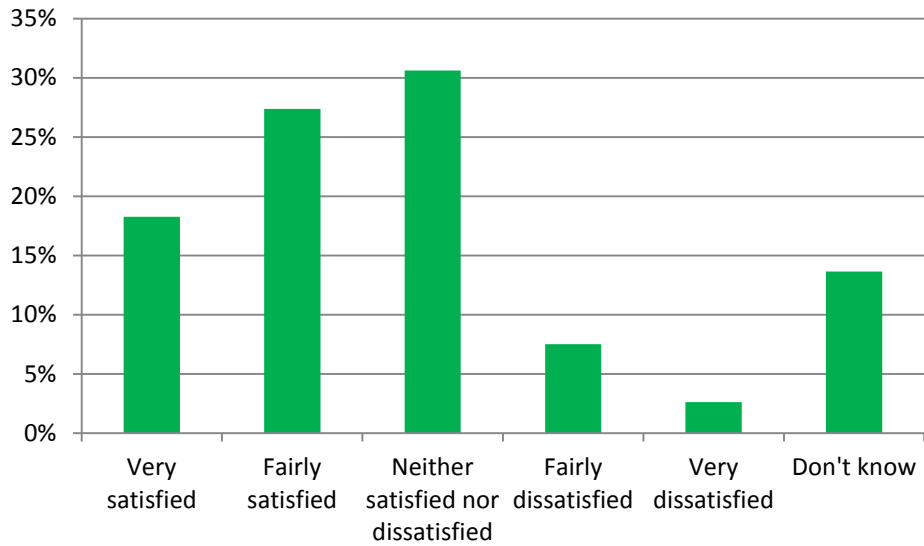
5   Passengers' trust in their bus operator

The set of questions below are designed, for this survey, in order to understand passengers' trust in their bus operator.
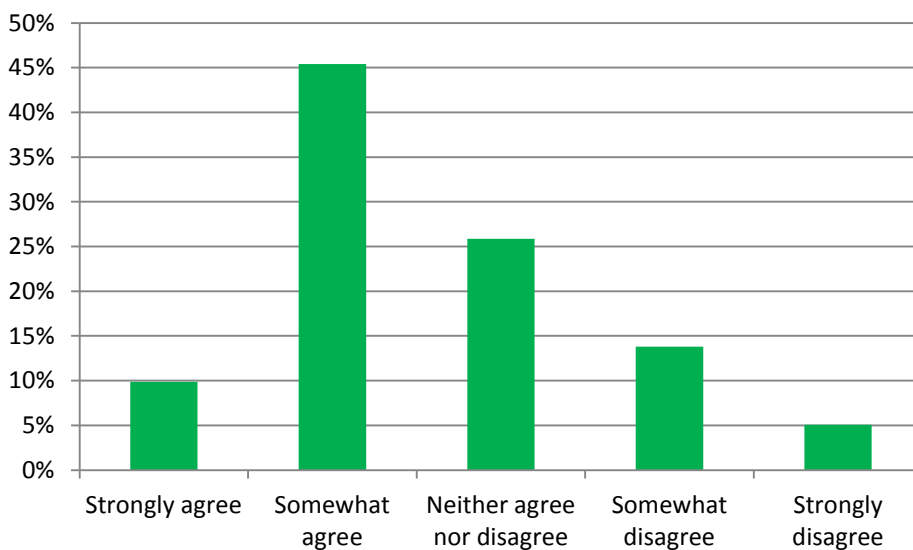
5.1 Trust in the operator

All things considered, 71% of passengers score five or more (on a scale of one to seven) when asked about trust in their bus operator.
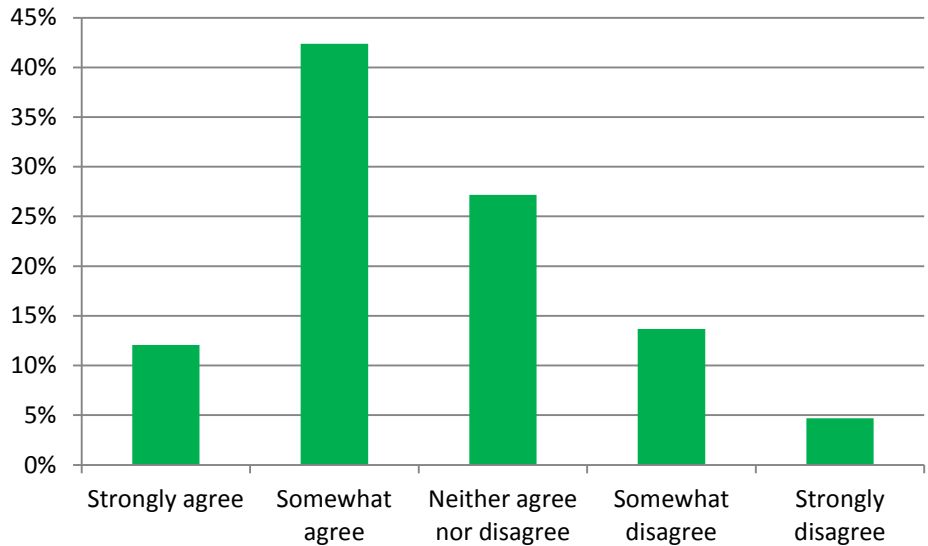
5.2 Buses turn up on time

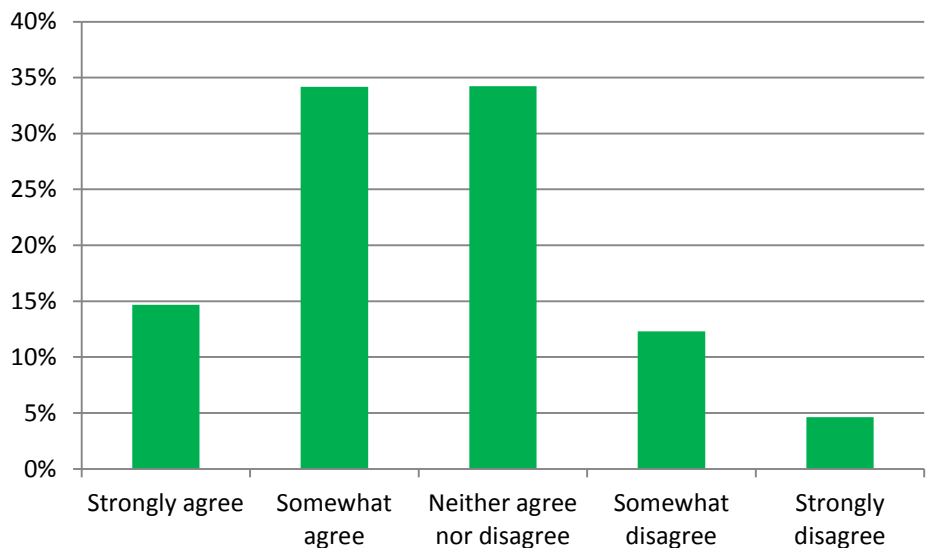54% of passengers agree that their bus operator can be relied on to turn up when they say they will.

5.3 Bus arrives at destination on time

55% of passengers agree that their bus operator can be relied on to get them where they want to go on time.
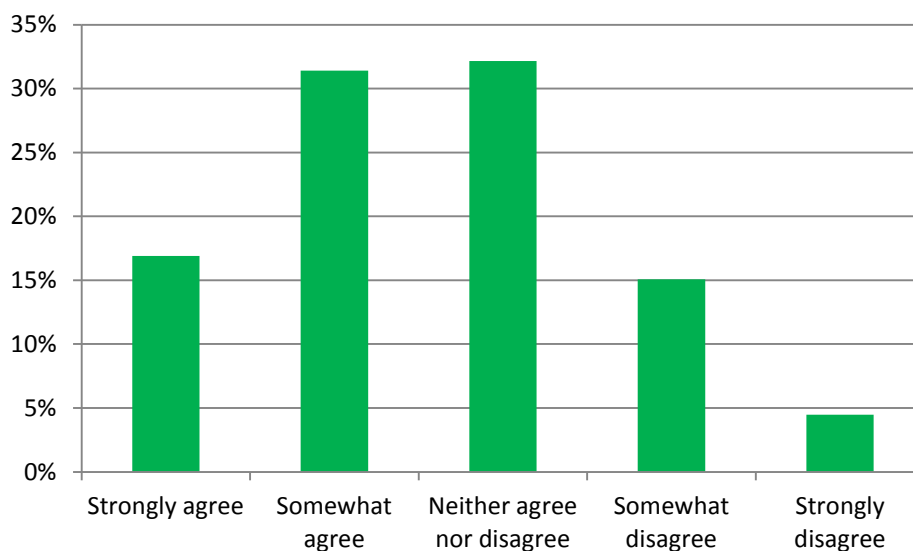

5.4 Drivers who care about their driving standards

49% of passengers agree that they have drivers who care about the standard of their driving.
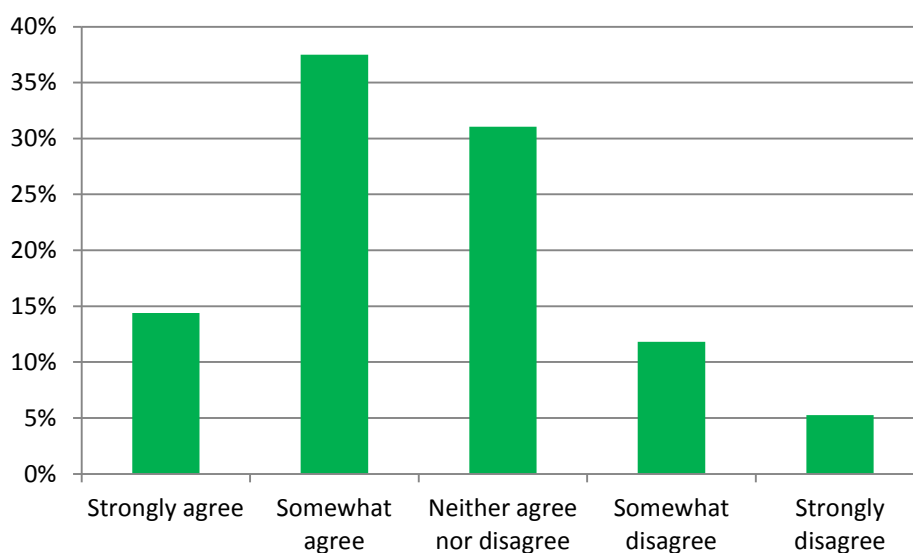
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5.5 Value for money

48% of passengers agree their bus operator provides good value for money.

5.6 Considerate drivers

52% of passengers agree they have drivers who are considerate to passengers.

5.7 Do bus operators care what passengers think of their service?

Only 38% of passengers agree that their bus operator cares what passengers think of their service. This is the lowest level of agreement for any of the questions designed to look at trust in the operator.
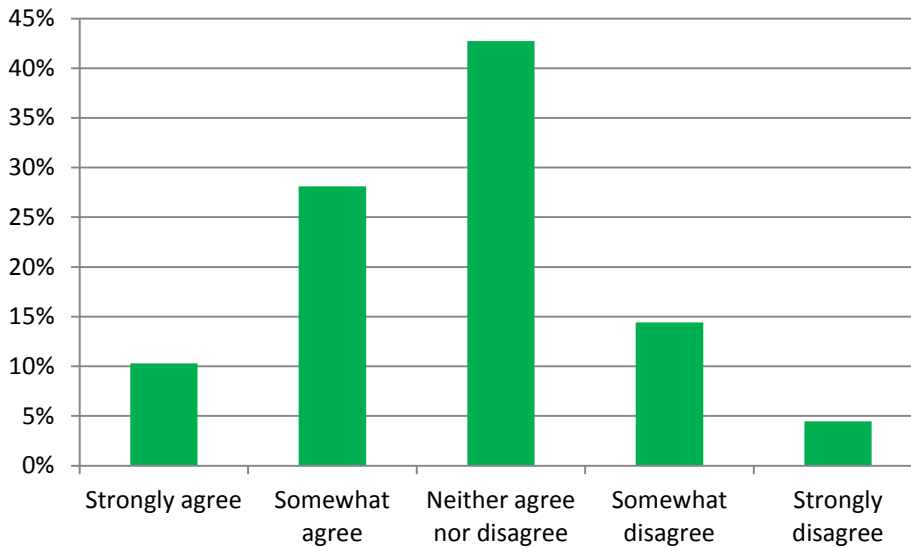
5.8 Operator uses technology well

58% of London passengers agree that their operator uses technology well for passengers' benefit. This contrasts with the percentage of passengers outside London at 44%.

This question is one of the few in the survey where there is a marked difference in the responses from London passengers compared to those outside London.
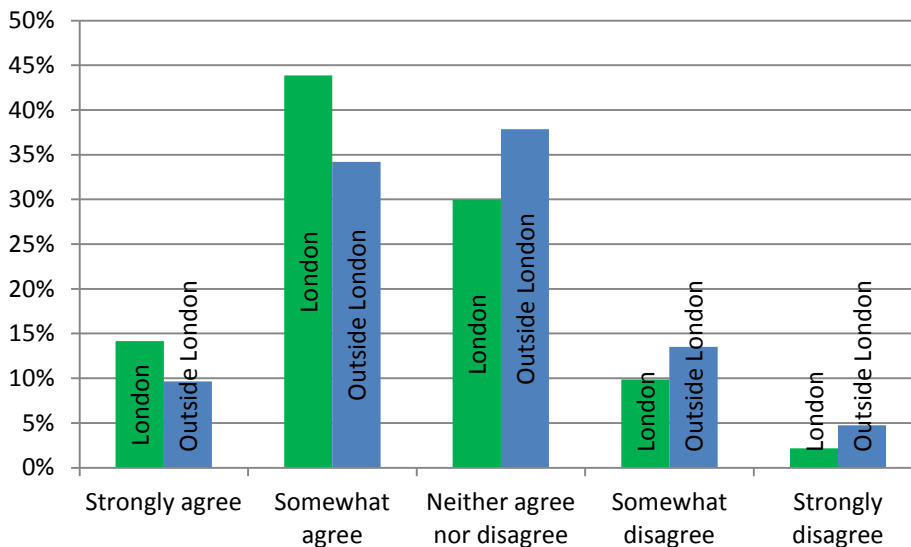
5.9 Operator welcomes contact

29% of London passengers agree that their operator welcomes contact from passengers. This contrasts with the percentage of passengers outside of London at 36%.
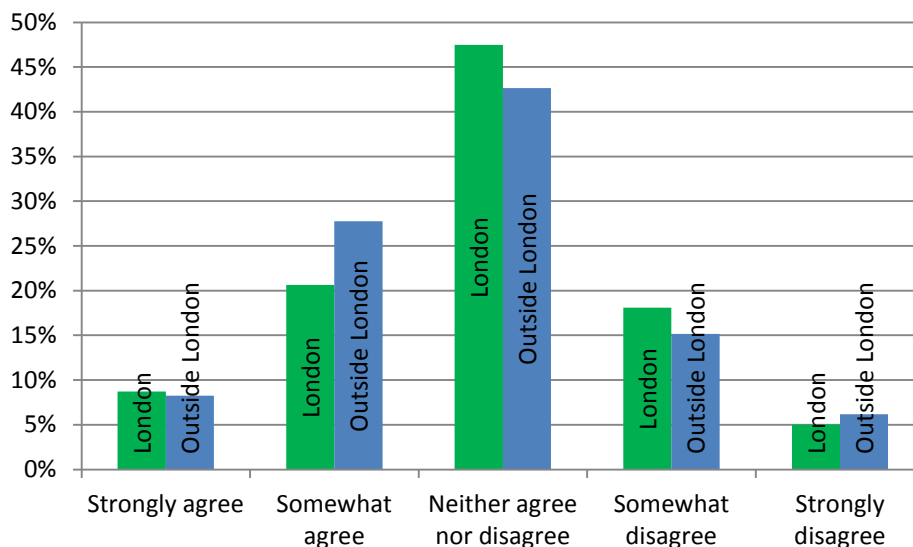
5.10 Operator is honest about problems

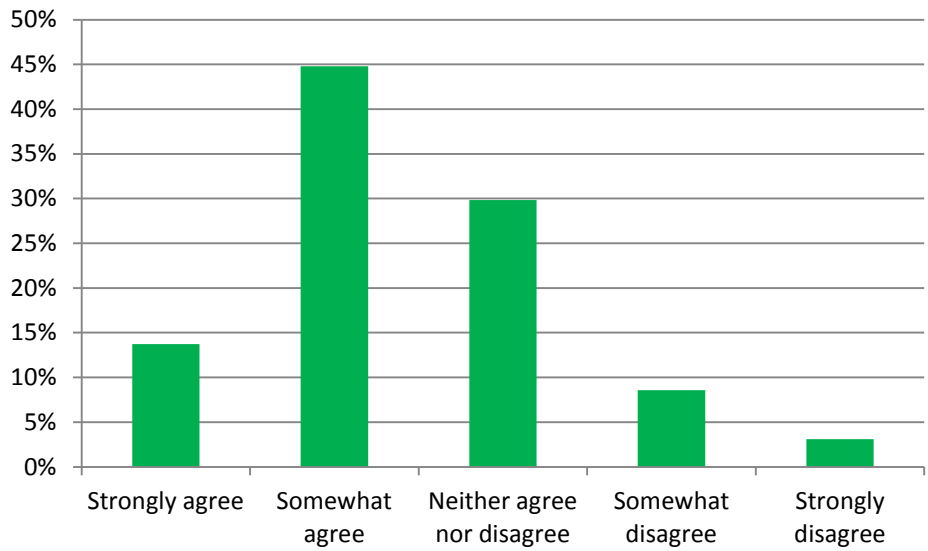48% of London passengers agree that their operator is honest when there are problems. This contrasts with the percentage of passengers outside London at 41%.
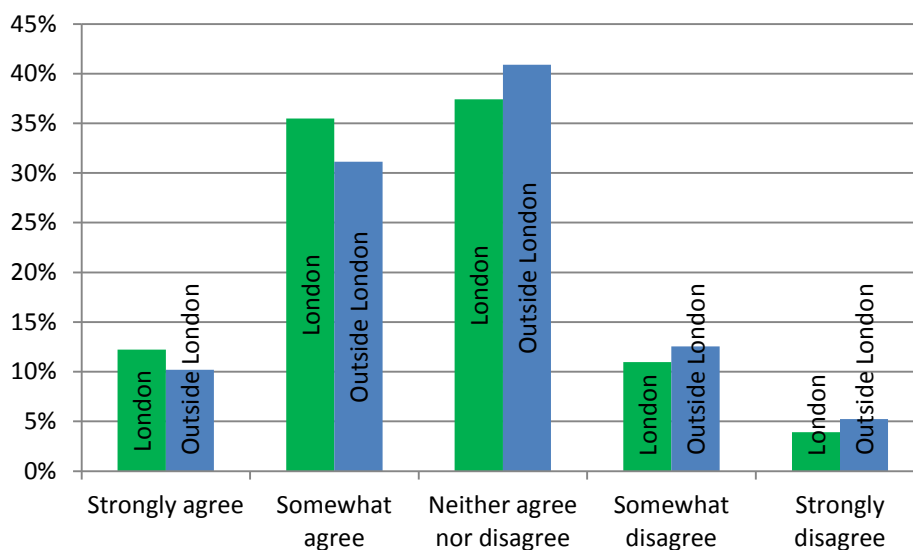
5.11 Service looks professionally managed

59% of passengers agree that their operator looks like they are professionally managed.

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6   Bus passenger priorities for improvement

This chapter discusses the response to questions asking bus passengers what improvements they want to see.

The first was an open text question asking what improvements should be made to encourage more people to use the bus. The answers were then coded. The top coded suggestions (higher than 3% of mentions) are tabulated below. Allowing a free-text response is new to this survey – respondents were previously just asked to choose from a list of potential improvements.

None of the suggestions are unexpected. The cost of the fare, reliability of services and greater frequencies are key priorities. A better travelling environment, in its widest sense, is also important to attract passengers to the bus.

Top Improvements to encourage more people to use buses	% stated
Cheap fares / keep ticket prices low / affordable	19.5
Greater frequency / more regular service / more buses	15.0
Pleasant travelling environment / less crowded / more seating / more comfort / space	9.4
Cleaner buses / more hygienic / less smelly	7.4
Nicer / friendlier drivers / more mindful / considerate of their passengers	6.1
Punctuality / arrive on time / stick to timetable	5.9
Wider / larger / more extensive network / more routes / stops	5.6
Reliability / more reliable service / less cancellations / take action to ensure reliability of service	4.1
Temperature control / air conditioning	3.4
To be quicker / provide faster journeys	3.4
Better drivers / improved driver training	3.1
Improved bus lanes / better enforced / more bus lanes	3.0
Greater security / safety / better handing of anti-social behaviour / more CCTV	3.0

Secondly, respondents were asked to rank 31 different attributes.

Again, the results are as one would expect. Reliability, greater frequencies and tackling anti-social behaviour are key priorities. Reliability and the travelling environment are as important in this as in the previous survey. However, value for money has risen up the table for all passengers, from ninth to second. For fare paying passengers this now the top priority.

There are some other marked differences between fare and concessionary fare passengers:

I.   Concessionary fare passengers rank 'Drivers allowing more time for passengers to get to their seats' as much more important for them than for fare payers – 6th compares to 18th

II.   Fare payers rank 'Free Wi-Fi being more widely available' higher (10th) than concessionary fare passengers (26th).

Ranking of 31 attributes by passengers	Rank
More buses arriving on time at your bus stop	1
Better value for money from bus journeys	2
More journeys on buses running to time	3
More effort made to tackle any anti-social behaviour	4
Buses running more often than they do now	5
Buses going to more places you want to go	6
More bus stops with next bus displays	7
Better security at bus stops so people feel safer waiting for buses	8
Being given more/better information when delays occur on journeys	9
Cleaner and better maintained buses	10
Free Wi-Fi being more widely available	11
Better quality information at bus stops	12
Drivers allowing more time for passengers to get to their seats	13
Tickets which better allow travel on all local bus companies	14
More buses having next stop announcements/displays	15
Drivers showing more consideration to passengers	16
A smoother ride with less sudden braking or jolting	17
More personal space on buses (whether seated or standing)	18
Seats being more comfortable	19
Shorter journey times	20
Improved ventilation and temperature control	21
A more suitable range of tickets for how and when you use buses	22
More seating being made available	23
Being able to pay for bus travel with smartcards/ contactless cards/ mobile phones/ apps	24

Improved display of route numbers and destinations on the outside of buses	25
Improved information via apps/online on bus arrival/running times	26
Drivers communicating better with passengers	27
Making it easier to step on and off buses	28
More space for wheelchairs and buggies	29
Better maintained bus stops	30
Being able to buy tickets from more places	31

7   Conclusions

This latest bus passenger survey produced interesting results that generally accorded with our previous survey undertaken five years ago. Again reliability, frequency and tackling anti-social behaviour are important. But it seems clear that affordability is becoming increasingly important for passengers.

Bus passengers overwhelmingly say that the bus service is important to their local area and most are satisfied with the service they get and generally trust the operator.

There are some differences between the responses from London bus users and those using buses outside London. Particularly London bus passengers think their operator uses technology well.

There are also differences between fare payers and concessionary fare passengers. Clearly the cost of the fare is more important to fare payers, but they also are much more likely to want Wi-Fi on the bus. Freedom Pass holders want bus drivers to give them a little more time to sit down and they regard Bus Stop Countdown as more important.

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