London TravelWatch

The voice of transport users

Bus passengers' priorities for improvements in London

May 2010

This research was undertaken by Steer Davies Gleave.

The questionnaire, fieldwork report and results table can be found at **www.londontravelwatch.org.uk**

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Foreword

**Sharon Grant, Chair,
London TravelWatch**

Buses are indispensable for Londoners, commuters, visitors and tourists. They contribute hugely to the economic and social well-being of the capital. They serve the whole city, going to places where trains and tubes do not. They run 24 hours a day giving access to almost all Londoners to essential services, leisure and work. They are also the most accessible form of public transport for people with disabilities and those with baby buggies and young children. And bus travel costs less than other forms of public transport, and is the most efficient use of London's limited road capacity – buses are great people movers.

London's bus services have improved greatly over the last ten years, with more buses and more bus passengers than ever before. London TravelWatch has worked hard over many years to ensure bus passengers have a voice, and have pressed for improvements in frequency, better routes and for integrated ticketing. We are pleased that many of the improvements we have urged have been implemented.

However, at a time when difficult choices have to be made, we thought it was important to find out more about what matters to bus passengers. So, as the watchdog for London, and a champion for bus users in the capital, we commissioned this research so we could find out exactly what passengers wanted and expected from their bus service.

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What is clear from our findings is that Londoners have come to have high expectations of their bus services, and they want them to continue improving. This is a clear message for those responsible for London's transport system.

If passengers' main concern is punctuality and reliability, this means that more attention must be paid to ensuring buses have priority on London's roads, and supporting bus lanes, better enforcement of parking regulations, priority for buses at traffic lights and making it easier for them to get in and out of bus stops.

Any reductions in bus services or curtailment of bus routes will greatly inconvenience the growing numbers of people who now rely on London's buses. These include, disproportionately, shift workers, lower-paid workers, those in areas with minimal public transport provision, the elderly, young people and those with disabilities.

There are important upcoming equity issues about transport expenditure in London which deserve discussion, and I hope that these findings enhance the debate.

Executive summary

This research shows that the main concern for bus passengers is punctuality and reliable services, giving consistent journey times. The level of bus service in London needs to be maintained and improved, and buses need to be prioritised on London's roads

- Passengers also want improvements in frequency. Partly this is a function of improved reliability, as poor reliability tends to mask planned frequencies, especially where 'bunching' of buses occurs (the famous three buses turning up at once syndrome). Londoners expect the current number of bus services to be maintained and improved. Any proposals to reduce or cut bus services or bus routes will likely increase bus passenger dissatisfaction.

- Over three quarters of passengers thought that punctuality and reliability were in need of improvement. London TravelWatch believes this can only be achieved by ensuring buses have priority over general traffic on London's roads.

- Apart from punctuality and reliability, bus passengers in London have different priorities from bus passengers nationally. This is a reflection of the different nature of the network and the improvements made in London over the past decade. Many of these improvements were advocated and pressed for by London TravelWatch.

- In London, the 'countdown' system (waiting times displayed electronically at bus stops) ranks third for improvement needed (compared to 12th place nationally) among bus passengers. Transport for London is proposing 2500 screens, spread across bus stops as part of a renewed 'countdown' system. The system will enable mobile phone and internet technology to be used widely, which is welcome. However, this will mean fewer than one in six stops will have 'countdown' screens. Passengers expect a higher level of coverage than that and will be disappointed.

- Outside London, bus passengers prioritise integrated tickets, whereas this is far down the list for London's passengers.

- These results show that London has made significant advances in serving the needs of bus passengers. It is important that these advances are built upon and maintained, and not reduced.

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Introduction

Background

London TravelWatch is the official watchdog organisation representing the interests of transport users in and around the capital.

We commissioned Steer Davies Gleave to undertake this research in order to measure:

- Passengers' satisfaction with some attributes relative to stops and buses

- how passengers' experiences of travelling compare to their expectations, with regard to different attributes

- the relative priority attached to the improvements passengers would most like to see to the services they use.

Structure of the Report

This report gives details on the surveys conducted for bus passengers:

- Methodology

- Profile of bus passengers

- Bus passenger perceptions and expectations

- Improvement of bus services

- Conclusions.

Methodology

Introduction

In order to satisfy the objectives of the study in the most cost-effective way, the methodology chosen was a self completion questionnaire distributed to passengers waiting for a bus. Passengers were asked to take the self addressed questionnaire with them, then complete and return it (FREEPOST) upon completion of their journey. The survey was designed to investigate passengers' views of their latest bus experience.

The distribution of self completion questionnaires method enabled us to reach the widest range of passengers. The survey was scheduled in order to capture responses from passengers travelling at different times of the day and to avoid excessive clustering of responses.

The survey took place in the month of November, Wednesday 18 & Saturday 21 2009.

Bus Passengers Survey

The survey was conducted at three distinct locations:

- Brixton (vicinity of the underground station)

- Harrow bus station

- Victoria bus station.

The survey was aimed at passengers travelling at different times of the day, on both a weekday and on a weekend during the following hours:

- Weekday

  ◊ 0700 – 1000 (AM peak times)

  ◊ 1200 – 1500 (inter-peak times)

  ◊ 1600 – 1900 (PM peak times).

- Weekend

  ◊ 1000 – 1600.

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Sampling

A total of 11,052 self completion questionnaires were taken by passengers at bus stops and stations across the above locations. Details of the distribution per location can be found on London TravelWatch's website. In all, 694 questionnaires were returned but only 676 were used for the analysis, after data checks and cleaning were completed. This gives a return rate of 6%.

Responses were weighted by age and gender to accurately reflect the profile of bus passengers in London[1].

Questionnaire Design

The questionnaire was composed of the following sections:

- Section 1: Your journey
- Section 2: Your experience
- Section 3: Your expectations
- Section 4: Your preference for possible improvements
- Section 5: About yourself.

In addition, there was a front page that introduced the survey, and recorded information about the date, location and time of the survey.

All passengers were asked to provide an assessment of the journey they were making on the day they were handed the questionnaire.

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1   from Travel in London Report 1, TfL, 2009

The sections below will give an overview of each section of the questionnaire. More details on the content of the questionnaire can be found on London TravelWatch's website.

Section 1: Your journey

This section gathered information about the journey. Hence, information on the purpose of the journey, frequency of travelling, journey duration, ticket type, awareness of frequency of service on that specific route.

Section 2: Your experience

In this section passengers were asked to consider certain listed attributes and indicate their level of satisfaction by using a five-point scale: from very dissatisfied to very satisfied. The option don't know/not relevant was also available.

The list of attributes was split in two sub-sections, comprising:

- Attributes relevant to the stop/station (e.g. personal security at the stop, cleanliness, provision of relevant information, etc.)

- Attributes relevant to the bus used (e.g. cleanliness, security on board, punctuality, etc.).

Section 3: Your expectations

In this section passengers were to indicate how the standards of the service experienced compared with the standards that they would reasonably expect, by using a five-point scale: from a lot worse to a lot better than they should expect to receive.

The list of standards of service was split in two sub-sections:

- those relevant to the stop / station

- those relevant to the bus used.

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Section 4: Your preference for possible improvements

This section listed 30 possible improvements for both stops/stations and bus services.

In order to facilitate the response, this section was divided in five sub-sections, each with seven attributes. Two improvements known to be important (cost and frequency), were repeated but with a different order.

In this section, passengers were asked to rate their preference for each improvement by selecting 1 (for most preferred) to 7 (least preferred).

Section 5: About yourself

Finally, this section gathered information about the respondents, including age group, gender, working status, and disabilities.

Pilot survey

The questionnaire was tested through a pilot survey at Reading bus station on the Friday, 25 September 2009, which produced 150 responses (not included in the final sample size).

The pilot was used to exclude parts of the questionnaire discouraging response and improve the wording in general and the presentation of the ranking questions.

Passenger profile

Introduction

This chapter provides an insight into the characteristics of the respondents, to help understanding the responses to the questionnaire. To this end we analyse here passengers' demographics and types of journeys made by the respondents.
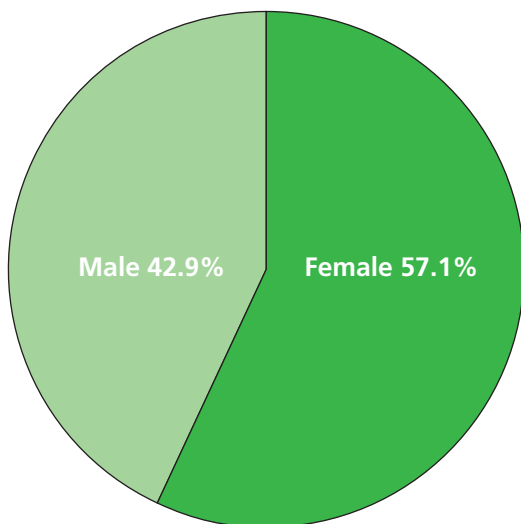
Bus passengers

Demographics

Gender
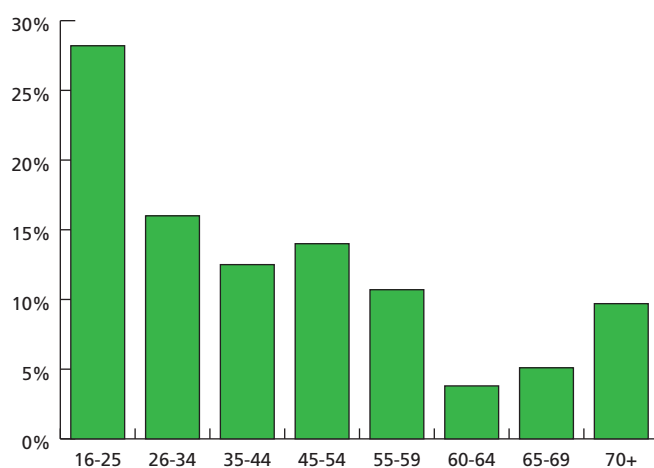
A little over half of bus passengers are female (57%).

Figure 3.1 - Gender of bus passengers

Male 42.9%   Female 57.1%

Age group

More than half (57%) of passengers were aged below 45, while less than one in five (19%) were aged over 60.
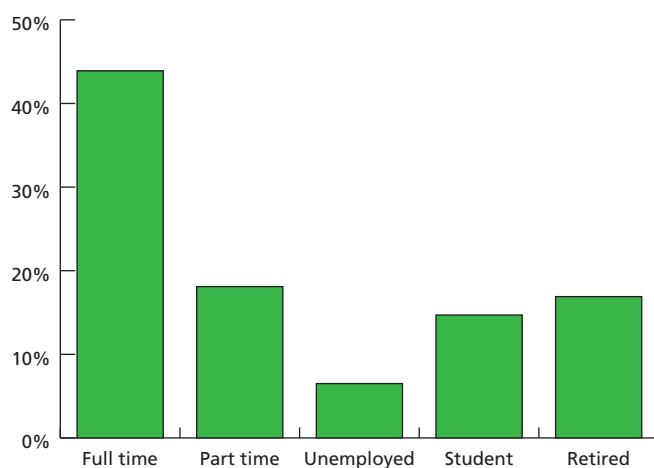
Figure 3.2 - Bus passengers age group


Working status and main occupation

The majority of passengers (62%) were in work, with 44% in a full time occupation. The unemployed made up the smallest working status category (6%).

Figure 3.3 - Working status of bus passengers

Nearly half of the passengers (49%) said they had some degree of managerial responsibility. Retired (17%) was the next most represented occupation category.

*Figure 3.4 - Main occupation of bus passengers*
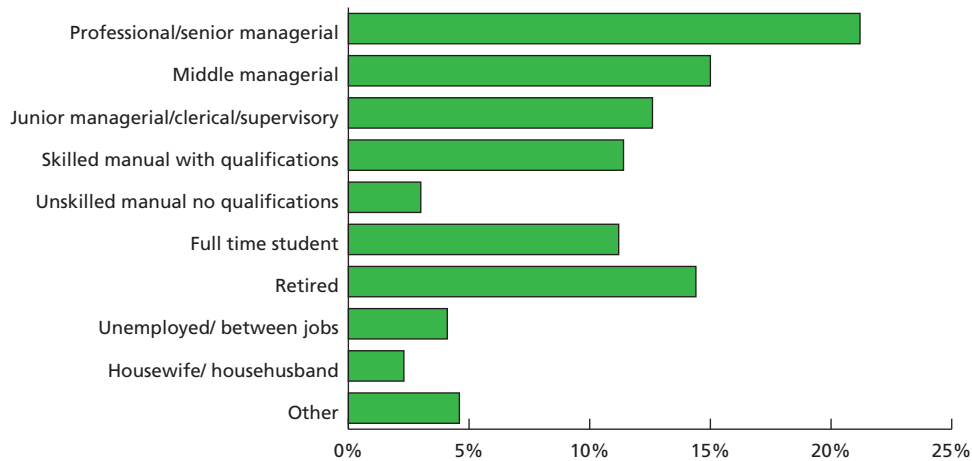
Journey characteristics

Respondents were asked several questions concerning their journey. Figure 3.5 shows the proportions of passengers making trips with different journey durations.

More than three quarters of the respondents (77%) had a journey not exceeding 30 minutes. Nearly one in twenty (6%) said they had a journey lasting more than an hour.

Figure 3.5 - Bus passengers journey duration
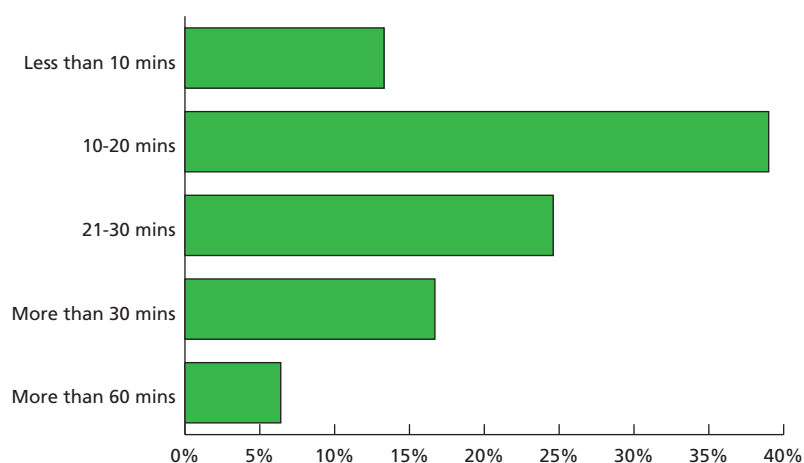
The majority of respondents said that their bus journey took about the expected amount of time (65%), that they take the bus at least two times a week (68%), and that they were travelling for reasons different than commuting and education (51%).

Passengers' expectations

Introduction

In order to identify what the priorities should be to improve the bus experience, the survey gathered information about passengers' current levels of satisfaction and about the perceived standards of the service the industry is offering, compared to what passengers reasonably expect.

Respondents were asked to rate their satisfaction with different attributes of the stop / station they use and different attributes of the bus service. This chapter provides details of respondents' satisfaction and how the service compared to their expectations.

Passenger Satisfaction

Introduction

Passengers were asked about their level of satisfaction with different attributes of the stops and stations they used and of the buses they travelled on.

In order to be able to readily compare satisfaction scores, the following scoring system was used:

Passenger rating	Score
• Very dissatisfied	-2
• Fairly dissatisfied	-1
• Neither satisfied nor dissatisfied	0
• Fairly satisfied	1
• Very satisfied	2

The option don't know / not relevant was also available, but these responses have been excluded from the overall scores.

For each individual an average satisfaction was calculated. Also, an

average satisfaction was also calculated within each of the survey sites and for all passengers.

An average positive score indicates more satisfaction than dissatisfaction, and a negative score more dissatisfaction than satisfaction.

The % Satisfaction is given by the sum of fairly satisfied and very satisfied.

The % Dissatisfaction is given by the sum of fairly dissatisfied and very dissatisfied.

Bus stop attributes

Table 4.1 shows the average satisfaction and dissatisfaction recorded across all passengers with regards to the bus stop attributes.

Responses were based on passengers thinking about the bus stops in their local area.

The closeness and convenience of bus stops to where passengers live and to other forms of public transport, were the two attributes that gave respondents the most satisfaction.

The range of destinations passengers can travel to was also appreciated.

The lowest satisfaction score was, on the other hand, given for real time information on when the next bus is due. In fact, this was the only attribute that recorded more dissatisfied (nearly half) than satisfied passengers.

Also information on fares scored poorly.

Table 4.1 - Average satisfaction for bus stop attributes

Bus stop attributes	Average satisfaction score	% Satisfied	% Dissatisfied
The closeness and convenience of the nearest bus stop to where you live	0.98	78%	15%
The closeness and convenience of bus stops in your local area to other forms of public transport	0.96	76%	15%
The range of destinations you can travel to by bus in your local area	0.90	74%	16%
Printed timetable and route information at the stop	0.71	67%	17%
The cleanliness of the stop and freedom from graffiti	0.55	62%	20%
Your personal safety whilst waiting at the stop	0.53	61%	20%
The provision of a shelter at the stop	0.45	60%	28%
Information on fares	0.04	38%	33%
Electronic information showing the length of time until the next bus is due to arrive	-0.20	41%	48%

Attributes such as information on fares, personal security whilst waiting at the stop, and cleanliness of the stop and freedom from graffiti, had relative neutral responses and this can be clearly seen in the next chart.

Figure 4.1 below shows the full range of satisfaction responses for the bus stop attributes.

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Figure 4.1 - Satisfaction responses for bus stop attributes
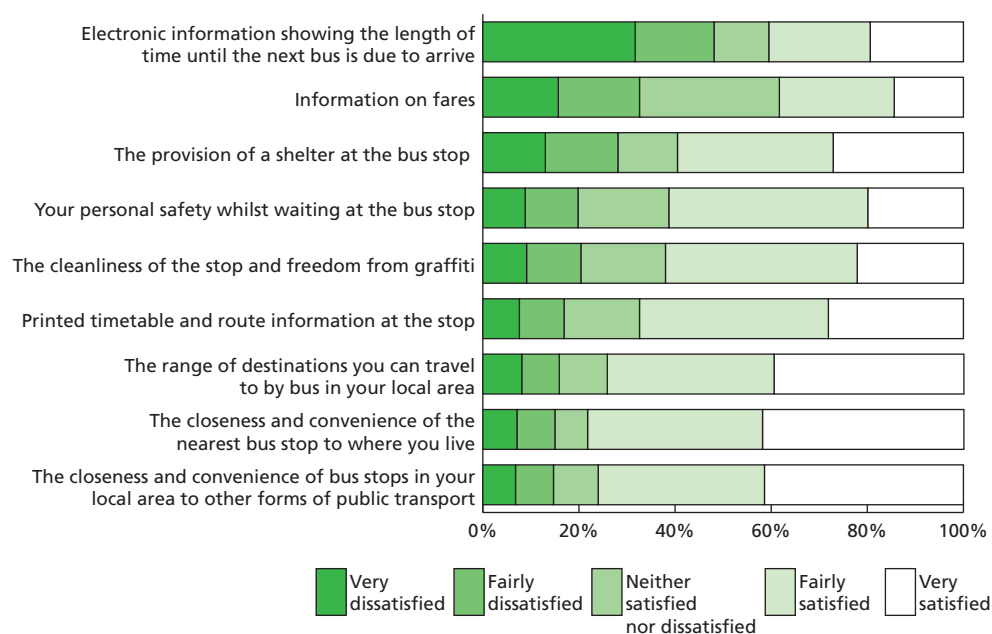
Bus attributes

Responses were given based on passengers thinking about buses in their local area, and especially the bus they used on the day of the survey.

More than eight in ten of the respondents were satisfied with the information provided on the outside of the bus (route number and destination) and this was the attribute that scored best.

Other good performing attributes were the ease of buying tickets, Travelcards/passes, and the ease of getting on and off the buses.

Punctuality of the bus satisfied just a little more than half of the passengers, and this was the worst performing attribute. In fact, nearly one in three passengers said they were dissatisfied with it.

Second last in the satisfaction scale was the frequency of the service, which had 29% of the respondents dissatisfied.

One in four respondents had a neutral opinion about the driver's appearance.

Finally, value for money was not satisfactory for a quarter of the respondents.

Table 4.2 - Average satisfaction for bus attributes

Bus attributes	Average satisfaction score	% Satisfied	% Dissatisfied
Information provided on the outside of the bus e.g. route number and destination	1.12	81%	10%
Ease of buying your ticket, travelcard or pass	0.95	73%	11%
Ease of getting on and off the bus	0.92	75%	16%
Drivers appearance	0.83	64%	11%
Your personal security while travelling on the bus	0.73	67%	13%
Cleanliness and condition of the outside of the bus	0.73	67%	14%
Information provided inside the bus	0.72	63%	15%
Helpfulness and attitude of the driver	0.67	61%	18%
Comfort of the seats	0.62	63%	18%
Length of time your bus journey took	0.61	66%	20%
Temperature inside the bus	0.60	63%	18%
Being able to get a seat on the bus	0.56	63%	23%
Cleanliness and condition of the inside of the bus	0.46	57%	23%
Appropriateness of the speed of the bus and freedom from jolting	0.42	57%	25%
Amount of room on board the bus for wheelchair users and people travelling with buggies or pushchairs	0.42	53%	24%
Value for money of your bus journey	0.40	55%	25%
Frequency of the buses on that route	0.34	58%	29%
Punctuality of the bus	0.30	57%	31%

Figure 4.2 below shows the full range of satisfaction responses for bus attributes.

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Figure 4.2 - Satisfaction responses for bus attributes
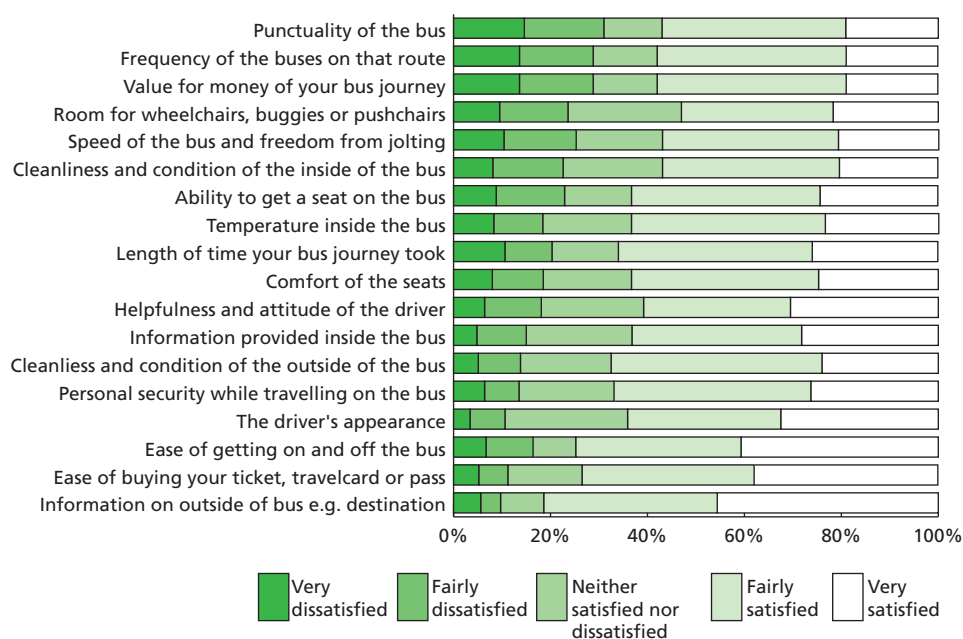
Passenger Expectation

In order to understand how passengers' expectations were met, respondents were asked to rate each of a series of attributes, both for the stop and the bus used, on a five-point scale. The scoring system used was the following:

Passenger rating	Score
• A lot worse than I should expect to receive	-2
• Worse than I should expect to receive	-1
• Neither better nor worse than I should expect to receive	0
• Better than I should expect to receive	1
• A lot better than I should expect to receive	2

A positive score indicates that, on average, passengers felt

that they were receiving a better service than reasonably expected, while a negative score indicates that passengers were not receiving the quality of service they expected.

Bus stop attributes

The expectation scores for the bus stop attributes, averaged across all passengers, are shown in Figure 4.3 below.

The best performing attributes are those regarding the closeness and convenience of the bus stops, both to where passengers live and to other forms of public transport.

Also, the range of destinations where passengers can travel to performs above expectations.

Where passengers felt disappointed was with the real time electronic information of when next bus was due, and information on fares. It is also worth mentioning is the attribute regarding the provision of a shelter at bus tops.

Figure 4.3 - All passengers: rating of bus stop attributes

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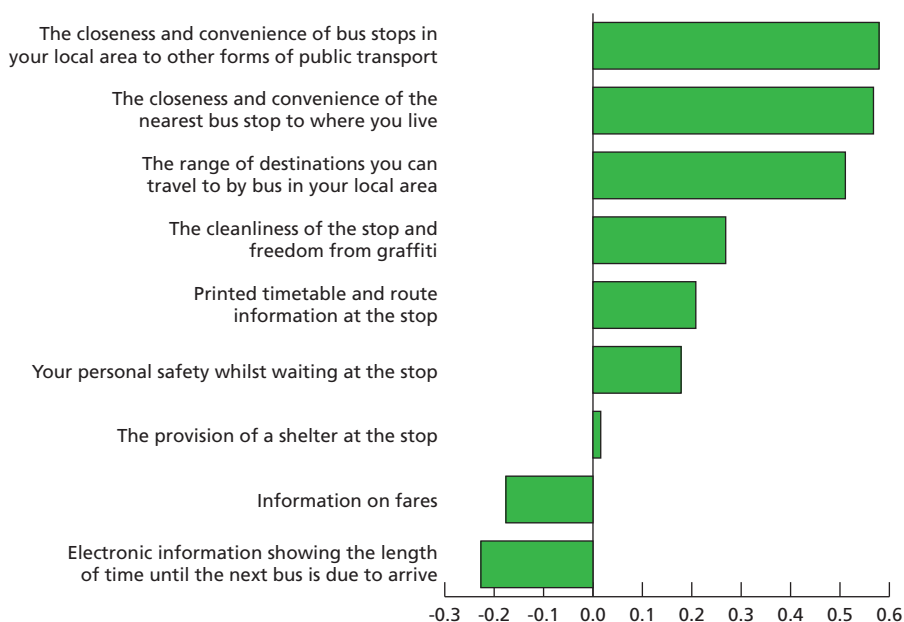
Bus attributes

The majority of the bus journey attributes are performing above expectations, with some doing very well, like information provided on the outside of the bus (e.g. route number and destination), the driver's appearance, the ease of buying a ticket and the cleanliness and condition of the outside of the bus.

The results, however, draw attention on two very key elements of the service: punctuality and frequency. Both performed below expectation and sit at the bottom of the chart below (Figure 4.4).

Passengers, also, indicated that on average their expectations were met for value for their money.

Figure 4.4 - All passengers: bus journey attributes
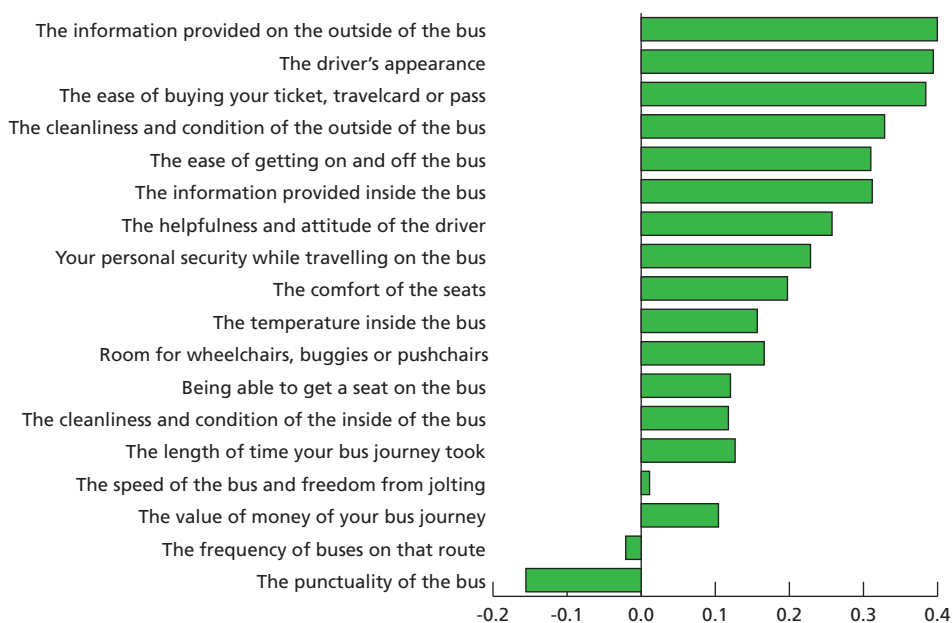
Further analysis

In order to gather more insight from the collected data, and understand how different types of passengers experience the service, further analysis was conducted and it is shown in the next four figures.

Having conducted the survey in three distinct locations,
it is useful to see how the responses compared. This is
shown in Figure 4.5 in respect of the bus attributes.

All passengers, regardless of the survey location, felt disappointed
with the electronic information on next bus due and the information
on fares. Brixton passengers in particular, and those using Victoria
bus station, also felt dissatisfied about the provision of shelters.

On the positive side, all passengers (in particular in Harrow)
were satisfied with the range of destinations they can travel
to, and the closeness and convenience of bus stops to
both where they live and to other forms of transport.

With regard to printed timetable and route information,
Harrow passengers seem to get the best service,
with the least satisfactory being in Brixton.

Victoria passengers seem to feel the safest.

*Figure 4.5 - Passengers in Brixton, Harrow
and Victoria: bus stop attributes*
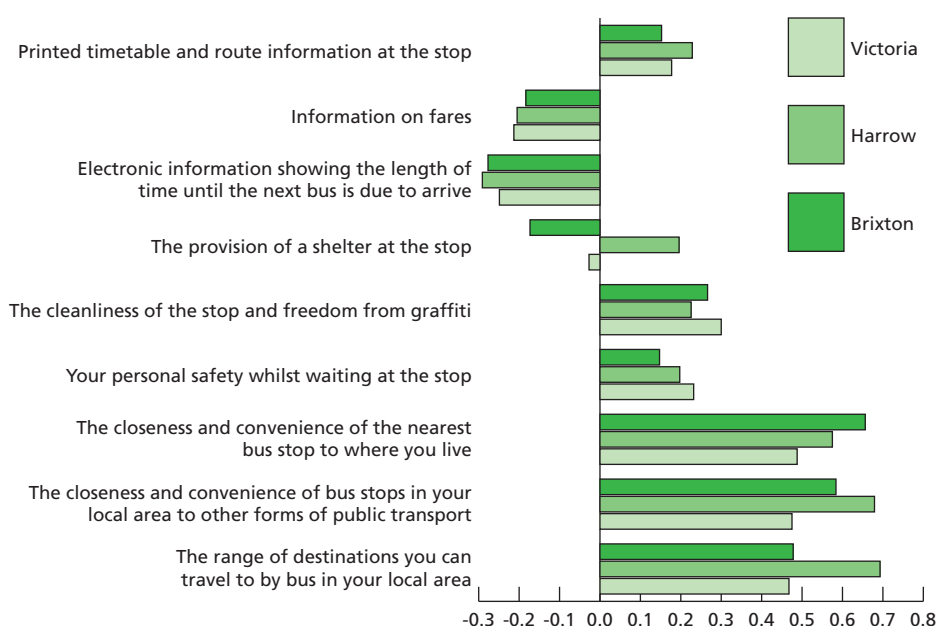
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Figure 4.6, illustrates how the same passengers compare in rating their expectations for the bus journey attributes.

Overall, Brixton is where passengers experienced the most disappointing services: punctuality of the bus, cleanliness and condition of the inside of buses, value for money and appropriateness of speed of the bus and freedom from jolting left Brixton passengers disappointed.

On the other hand, it was only in Brixton where passengers had their expectations met for the frequency of the service, although only just, with passengers in Victoria the most disappointed. Bus punctuality was seen as disappointing by all passengers, particularly in Harrow.

In terms of positive notes, the most satisfied passengers were recorded in Harrow particularly with regard to the ease of buying tickets, Travelcards and passes. Passengers from Harrow, in general, recorded the most positive feedback across the remaining of the attributes (exception made for the cleanliness and condition of the inside of the bus).

Finally, passengers have the best chance to get a seat on the bus in Harrow.

Figure 4.6 - Passengers in Brixton, Harrow and Victoria: bus journey attributes
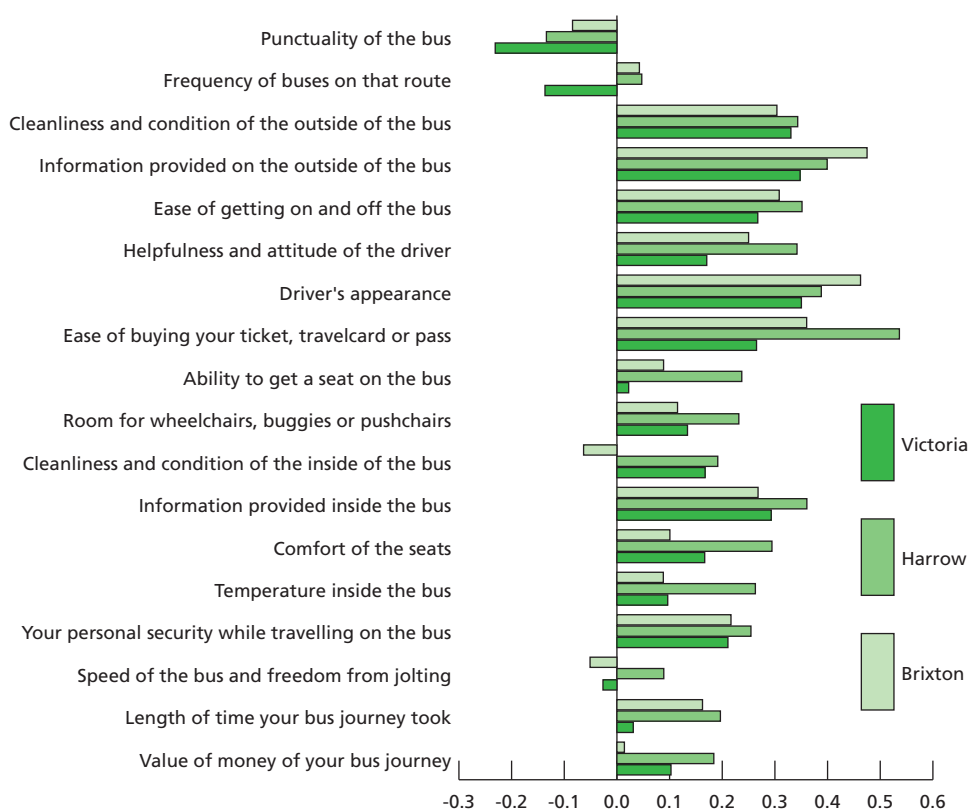

Figure 4.7 gives the opportunity to look at how different attributes are viewed and experienced by concessionary and non-concessionary passengers.

All bus attributes recorded a positive response (with different degrees) from concessionary respondents. The least positive were for those attributes regarding information: real time electronic information showing the length of time until next bus is due to arrive and information on fares.

The range of destinations they can travel was the attribute that impressed concessionary passengers the most. Others, similarly impressive for concessionary, were the closeness and convenience of bus stops to where they live and to other forms of transport.

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Non-concessionary passengers were particularly unhappy with the electronic information on next bus due, information on fares and to some extent also with the provision of shelters.

Figure 4.7 - Concessionary and non-concessionary passengers: bus stop attributes
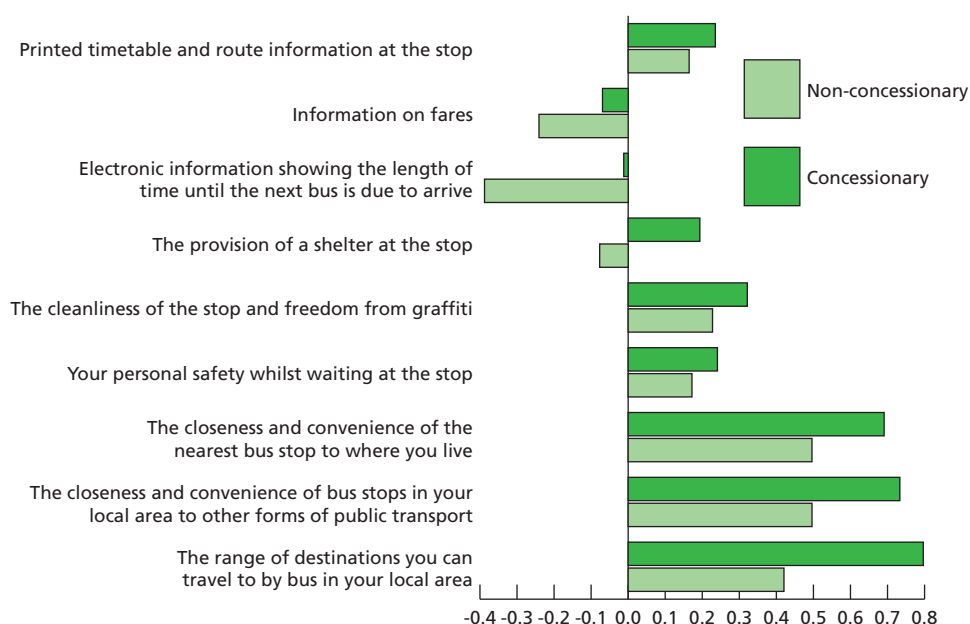
Figure 4.8 shows us that concessionary passengers feel positive about all the attributes relevant to the bus journey experience, with the value for money and ease of buying tickets scoring the highest, unsurprisingly. The difference in opinions is stark compared to with non-concessionary passengers.

Punctuality of the bus was, instead, the most disappointing attribute for non-concessionary passengers, followed by the frequency, value for money and length of journey time.

Where non-concessionary passengers felt more positive was for the information provided outside the bus (e.g. route number and destination), driver's appearance and ease of buying tickets, Travelcards and passes.

Overall, these results seem to reflect the higher expectations that non-concessionary passengers have for these attributes.

Figure 4.8 - Concessionary and non-concessionary passengers: bus journey attributes

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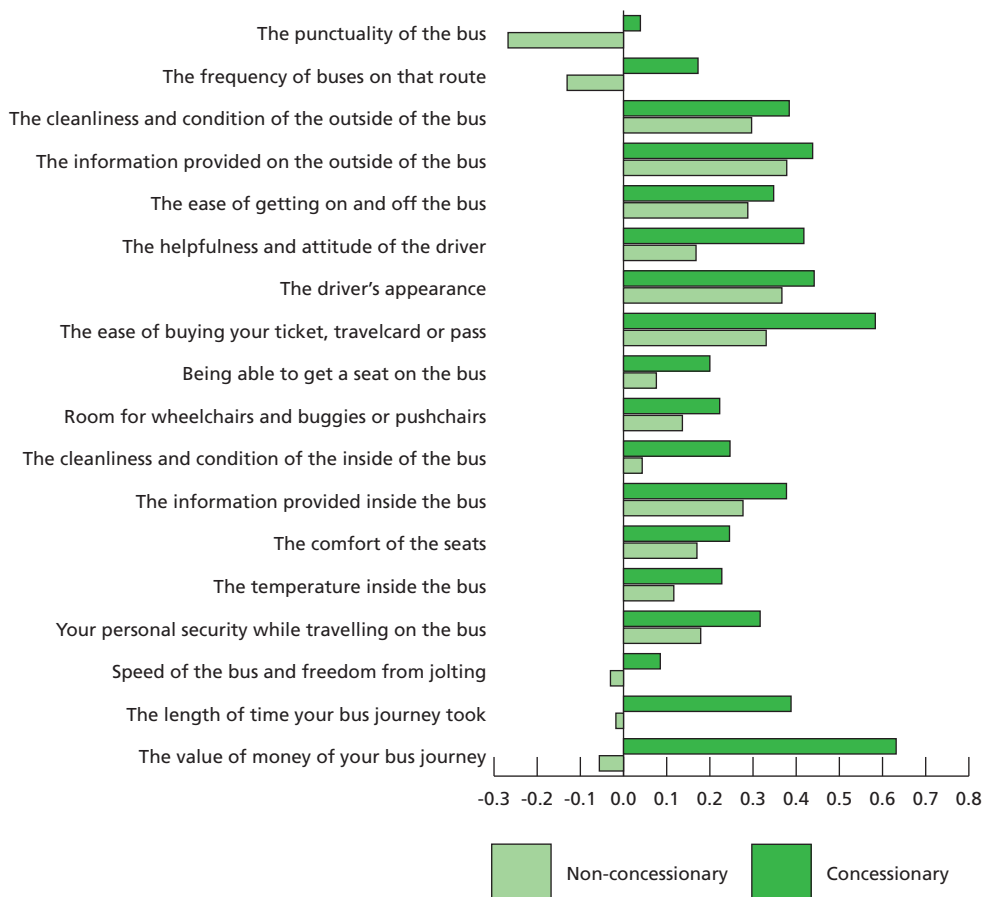
Importance of improvements

Introduction

In order to determine what attributes need to be prioritised for potential improvements, passengers were asked to rank them in order of preference (1=highest; 30=lowest).

The overall London rankings were weighted by age and gender profiles for London residents, to weight up to the total volume of bus trips by London residents on an average weekday (2.79 million[2]).

All Passengers

Table 5.1 below show the results in order of ranking for all passengers. For comparison purposes, the same table shows the ranking that passengers indicated in a parallel survey conducted outside the London area and nationally.

On average, London passengers indicated that top priority should be given to improving the punctuality of the service, followed by improving the frequency (2nd) and the electronic displays (3rd) showing the correct length of time for when next bus is due.

The comparison with the rest of the England shows that while the first two priorities are exactly as indicated outside London, the electronic displays of real time information at bus stops has more importance in the capital than outside, where it is ranked only 12th.

While outside London the attribute regarding the availability of tickets and passes enabling to travel across different operators is amongst the top four, in the capital this is only 21st reflecting the unique situation in London.

The next two priorities for London passengers are

2   from Travel in London Report 1, TfL, 2009

regarding the improvement of drivers' attitude (5th) and the security on board of buses (6th).

The least important were the ease of buying tickets, Travelcards and passes (26th), comfort of seats (27th), information of fares at bus stops (28th), driver's appearance (29th), and cleanliness of the outside of the bus (30th).

Table 5.1 - All Bus Passengers: Ranking for Potential Improvements

Attribute	London	Outside London
More buses are on time or within 5 minutes of when they are scheduled to arrive	1	1
Buses run more frequently at times when you want to use the bus	2	2
Electronic displays showing the correct length of time until the next bus is due to arrive are available at all bus stops	3	12
The correct route number and destination is clearly displayed on the outside of all buses	4	14
All bus drivers are helpful and have a positive attitude	5	7
Personal security onboard the bus is improved through the use of CCTV cameras on all buses	6	13
All passengers are able to get a seat on the bus for the duration of their journey	7	3
Buses go to a wider range of destinations in your local area	8	5
Bus fares, tickets and passes offer better value for money	9	6
All buses drive at an appropriate speed and are free from jolting	10	15
Accurate timetable and route information is available at all bus stops	11	8
Personal security whilst waiting for the bus is improved through the use of CCTV cameras at all bus stops	12	11
Tickets and passes are available that entitle you to travel on all types of public transport in your local area, not just buses	13	9

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Attribute	London	Outside London
All bus stops have a well-maintained shelter	14	10
The length of time your bus journey takes is reduced by 5 minutes	15	23
All buses have sufficient room for wheelchair users and people with a buggy or pushchair to travel in comfort without obstructing other passengers	16	16
All buses have low floors and are easy to get on and off	17	17
The inside of the bus is clean and litter-free at all times of the day	18	21
The name of the next bus stop is announced or displayed electronically on the bus during the journey	19	28
Bus stops are located closer and with easier access to other forms of public transport e.g. rail stations in your local area	20	18
Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company	21	4
Bus stops are located closer and with easier access to where you live	22	22
The temperature inside the bus is regulated at all times of the year to ensure it is neither too hot nor too cold	23	24
All bus stops are clean and free from graffiti	24	20
Printed timetables, route information and other useful information is provided inside all buses	25	25
Bus tickets, travelcards and passes can be purchased more easily and from a wider range of sources	26	19
The seats onboard the bus are very comfortable	27	27
Information on fares is available at all bus stops	28	26
All bus drivers are smartly dressed and have a professional appearance	29	29
The outside of the bus is clean and in better condition	30	30

Passengers from Brixton, Harrow and Victoria

Table 5.2 below shows the ranking results compared across the three survey locations.

The top three priorities are common (although in slightly different order) to all locations. They are: improved punctuality (1st in Harrow and Victoria, 2nd in Brixton), improved electronic displays about when next bus is due to arrive (1st in Brixton, 2nd in Harrow and 3rd in Victoria), and improved frequency of service (3rd in Brixton and Harrow and 2nd in Victoria).

The rest of the attributes are broadly comparable across the different locations, with the exception of the following: personal security at bus stops, bus stops with well maintained shelters and personal security onboard. These are respectively ranked 6th, 8th and 5th in Harrow but noticeably lower in the other two locations.

In Harrow, passengers seem to experience more difficulty in getting on and off buses. This can be seen with the attributes like all buses to have low floors and easy to get on and off and buses able to pull in to the kerb at all times (respectively ranked 11th and 13th, but significantly lower in Brixton and Victoria).

Finally, Harrow passengers seem to get a better value for money and to have fewer problems in getting tickets and passes for intermodal journeys (the relevant attributes are ranked much lower here, 20th and 23rd respectively, than in Brixton and Victoria).

Table 5.2   Bus Passengers in Brixton, Harrow and Victoria

Attribute	London Average	Brixton	Harrow	Victoria
More buses are on time or within 5 minutes of when they are scheduled to arrive	1	2	1	1
Buses run more frequently at times when you want to use the bus	2	1	2	3

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Attribute	London Average	Brixton	Harrow	Victoria
Electronic displays showing the correct length of time until the next bus is due to arrive are available at all bus stops	3	3	3	2
The correct route number and destination is clearly displayed on the outside of all buses	4	4	4	6
All bus drivers are helpful and have a positive attitude	5	6	7	5
Personal security onboard the bus is improved through the use of CCTV cameras on all buses	6	7	12	4
All passengers are able to get a seat on the bus for the duration of their journey	7	5	10	17
Buses go to a wider range of destinations in your local area	8	14	9	8
Bus fares, tickets and passes offer better value for money	9	12	14	7
All buses drive at an appropriate speed and are free from jolting	10	17	6	12
Accurate timetable and route information is available at all bus stops	11	16	8	13
Personal security whilst waiting for the bus is improved through the use of CCTV cameras at all bus stops	12	13	5	16
Tickets and passes are available that entitle you to travel on all types of public transport in your local area, not just buses	13	9	20	10
All bus stops have a well-maintained shelter	14	8	23	11
The length of time your bus journey takes is reduced by 5 minutes	15	18	15	15
All buses have sufficient room for wheelchair users and people with a buggy or pushchair to travel in comfort without obstructing other passengers	16	11	25	9

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Attribute	London Average	Brixton	Harrow	Victoria
All buses have low floors and are easy to get on and off	17	10	17	19
The inside of the bus is clean and litter-free at all times of the day	18	15	18	18
The name of the next bus stop is announced or displayed electronically on the bus during the journey	19	19	16	14
Bus stops are located closer and with easier access to other forms of public transport e.g. rail stations in your local area	20	22	11	24
Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company	21	24	13	20
Bus stops are located closer and with easier access to where you live	22	23	19	25
The temperature inside the bus is regulated at all times of the year to ensure it is neither too hot nor too cold	23	20	21	22
All bus stops are clean and free from graffiti	24	26	22	21
Printed timetables, route information and other useful information is provided inside all buses	25	25	24	26
Bus tickets, travelcards and passes can be purchased more easily and from a wider range of sources	26	21	29	23
The seats onboard the bus are very comfortable	27	27	26	28
Information on fares is available at all bus stops	28	28	27	30
All bus drivers are smartly dressed and have a professional appearance	29	29	30	27
The outside of the bus is clean and in better condition	30	30	28	29

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Conclusions

The passenger survey produced interesting results, in particular with regard to the priorities for improvements and how these compare between the London survey and the survey conducted outside the capital.

While the need for improvements in punctuality and frequency of service is given as top two priorities in both surveys (passengers nowadays expect increase in frequencies as a norm), for some other attributes the contrast in ranking could not have been starker. This well reflects the differences between the nature and structure of the London bus network and outside.

For example, in London passengers indicated the electronic displays at bus stops (aka Countdown) as the next attribute requiring the most urgent improvement. But, this is ranked only 12th on average outside London.

Another example is given by the bus shelters. Outside London, being the services likely less frequent, sheltered bus stops are more important and this is reflected by the difference in the rankings (10th as opposed to 14th in the capital).

Another aspect that the survey revealed is that outside London passengers are more likely to expect a seat while in London they tend to be more tolerant of standing (3rd as opposed to 7th).

The attribute that, probably, most highlighted the greatest difference is that regarding the integrated ticket system or lack of it. Outside London, the need for tickets and passes that entitle passengers to travel on all buses services and not just those operated by a specific bus company is strongly felt, as the position of the relevant attribute at 4th testifies. In London, the importance of such an attribute is only 21st. Undoubtedly, the Oyster card and travelcards give London a clear advantage.

Differences between locations reflect specific local characteristics. For example, in Brixton route numbers displayed on the outside of the buses can be difficult to read because of the large number of bus stops in the High Street close together and served by many routes.

And still in the High Street of Brixton, there is little available space to put shelters for the bus stops.

Finally, the particular difficult conditions that the UK economy is experiencing as it is trying to exit the recession, may be one of the main reasons why it may take some time before passengers can really see improvements in many of the attributes tested by the survey.

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Notes

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London TravelWatch

Passengers' priorities

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