
Secretariat memorandum

Author : Vincent Stops

Agenda item: 6
PC081
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Bus passengers' priorities and trust in their operator

1 Purpose of report

- 1.1. To report a selection of the findings from a recent survey looking at bus passengers' priorities and their trust in the operator that provides their services.

2 Background

- 2.1. In 2010 Transport Focus, one of the organisations that represents bus passengers in England, outside London, and London TravelWatch published research looking at bus passenger priorities for improvement. Transport Focus has led this work.
- 2.2. This research has been repeated and the survey results are now available. The methodology has been improved since 2010 to obtain a more representative sample. This means caution should be taken in comparing results, but where priorities are ranked, their relative ranking is useful in comparing passenger priorities. Transport Focus has just made the data for the metropolitan areas outside London available to us for comparison with the London data. The data for fare paying and concessionary passengers is also available, but this will be less reliable as the sample size of concessionary passenger respondents is low. This research has, additionally, asked about the trust passengers have in their bus operator.
- 2.3. Transport Focus intend to publish their report in March.

3 Methodology

- 3.1. This will be verbally reported to members.

4 Survey results

- 4.1. Below is a selection of some of the responses to the 77 questions asked. Because of the differences in the bus market outside of London, not all of the questions are appropriate for London passengers, such as a knowledge of a passenger's bus company

- 4.2. There are a variety of question types. Some are factual. Some ask the participants to respond on a 1 to 7 scale, where 1 is really bad and 7 is really good. Other questions ask the participant about satisfaction: Very satisfied; fairly satisfied etc. Others ask the participant if they agree with a statement: Strongly agree; Somewhat agree etc. All results are reported as the percentage of respondents (on the vertical scale). Where there is a noticeable difference between London and England outside London, this is discussed. Further commentary will be provided in the published report.
- 4.3. Additionally, participants were asked about improvements that might be made to services, both as a free-text question and from a list of suggested improvements.

5 Discussion

- 5.1. This survey suggests that broadly the majority of bus passengers are satisfied with their bus services in London. Those issues previously identified as important areas for improvement remain.
- 5.2. Value for money has become more of a concern for passengers compared to five years ago. Bus Countdown is of lesser importance overall, but is still amongst the most important improvements for concessionary fare passengers.
- 5.3. All things considered, the majority of bus passengers trust their operator.
- 5.4. There are some interesting, but understandable differences between the scores in London compared to outside London. For example 58% think their London bus operator uses technology well, whereas only 44% think this outside London. There is a noticeably higher percentage of social grade C1 passengers in London than England (outside London). The published report will go into more detail.
- 5.5. passenger priorities for improvement are similar to those that were highlighted in 2010. There is a difference between fare payers and concessionary passengers insofar as Wi-Fi is higher on the list for fare payers and Bus Countdown lower. This is indicative of the take-up of Apps for next-bus information amongst younger passengers.
- 5.6. Value for money is, as one would expect, more important for fare paying passengers. Value for money has become more important to passengers than in 2010.
- 5.7. Better security at bus stops is, surprisingly, more important for fare paying passengers than concessionary passengers.

6 Equality impact

- 6.1. Buses are the only public transport mode that is fully inclusive, both in terms of its geographic coverage, accessibility and affordability. It is therefore important to address these issues to enable everyone to use the bus.

Affordability is more of a concern in this survey than in the previous one in 2010.

7 London TravelWatch Priority

- 7.1. The delivery of good a bus service is a priority for London TravelWatch.

8 Recommendation

- 8.1. This report is for noting.

9 Legal powers

- 9.1. Section 248 of the Greater London Authority Act 1999 places upon London TravelWatch (as the London Transport Users Committee) a duty to consider - and where it appears to the Committee to be desirable, to make recommendations with respect to - any matter affecting the functions of the Greater London Authority or Transport for London which relate to transport (other than of freight).

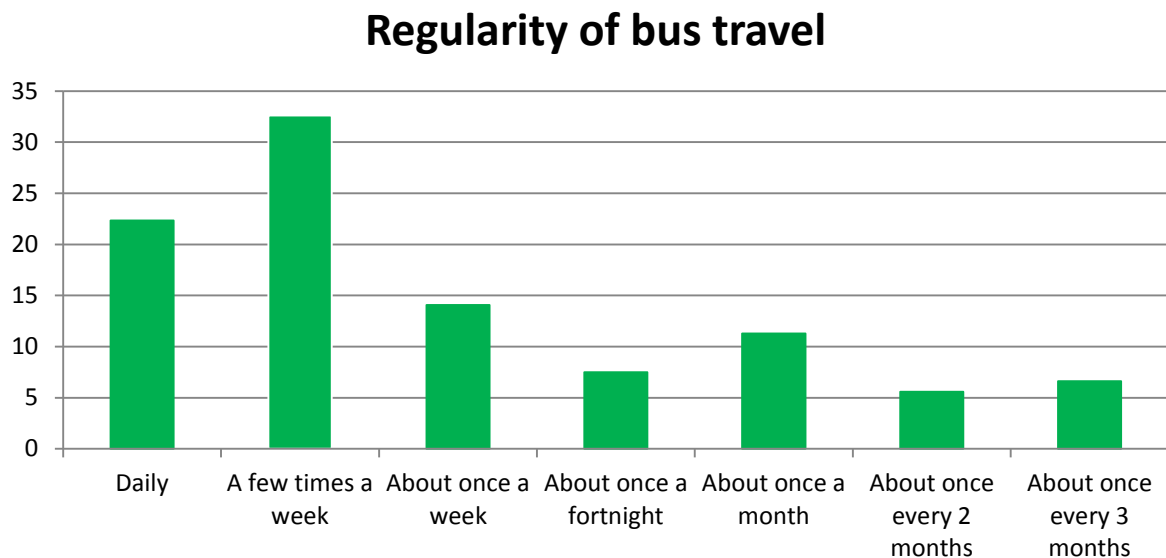
10 Financial implications

- 10.1. Transport Focus has commissioned this work. London TravelWatch has paid a marginal cost for additional London participants. The cost has been funded by the research budget.

Appendix

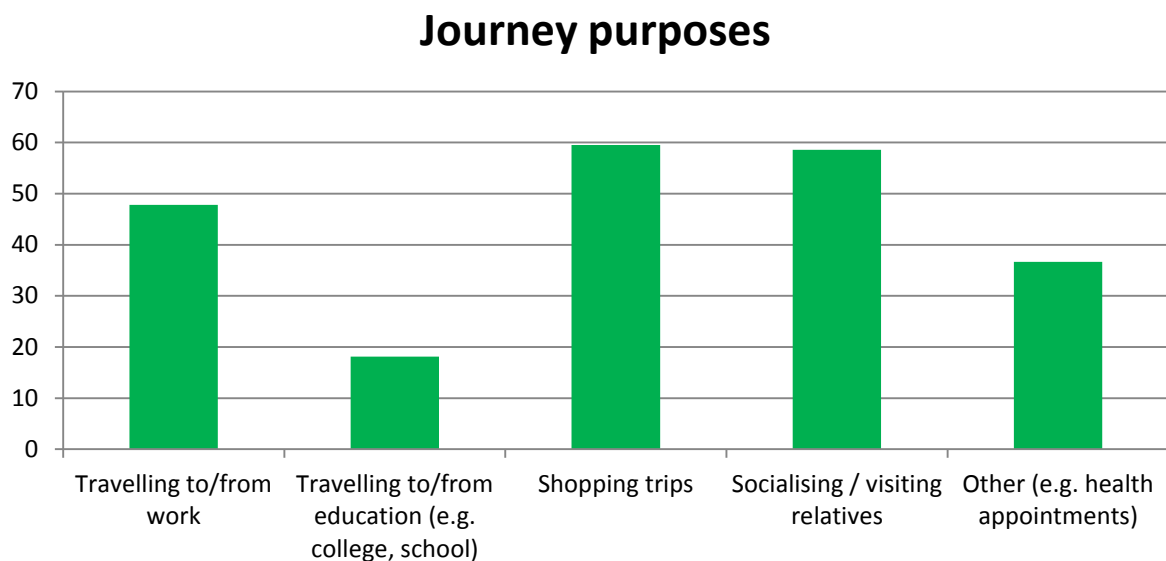
Questions

Q. How often do passengers travel?

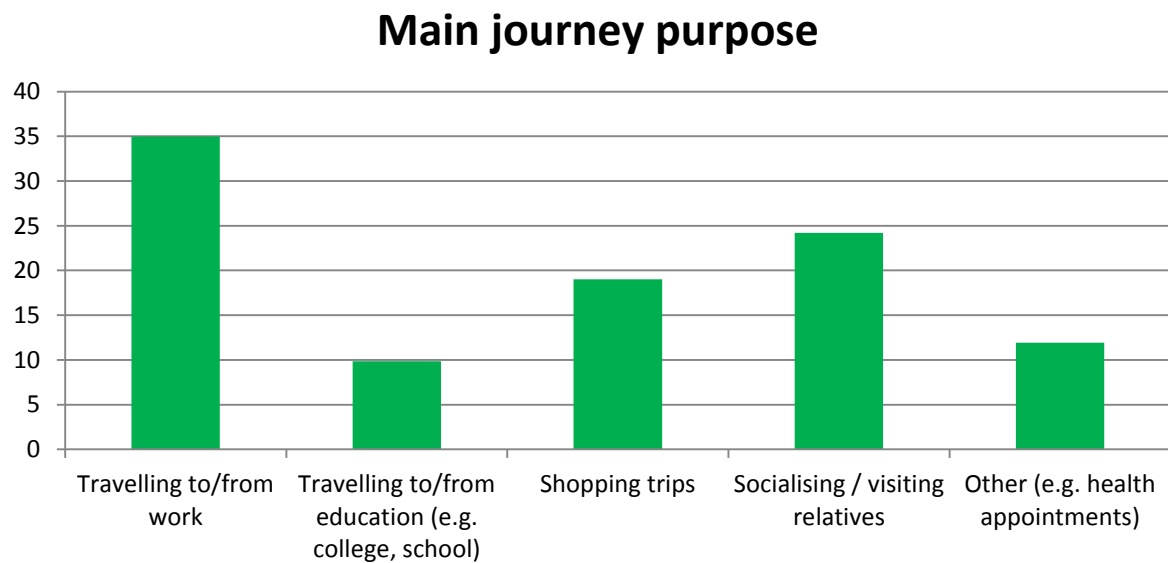


Most passengers are regular bus users, travelling daily or a few times a week.

Q Which types of journey are passengers using the bus for? [More than one journey purpose was possible.]

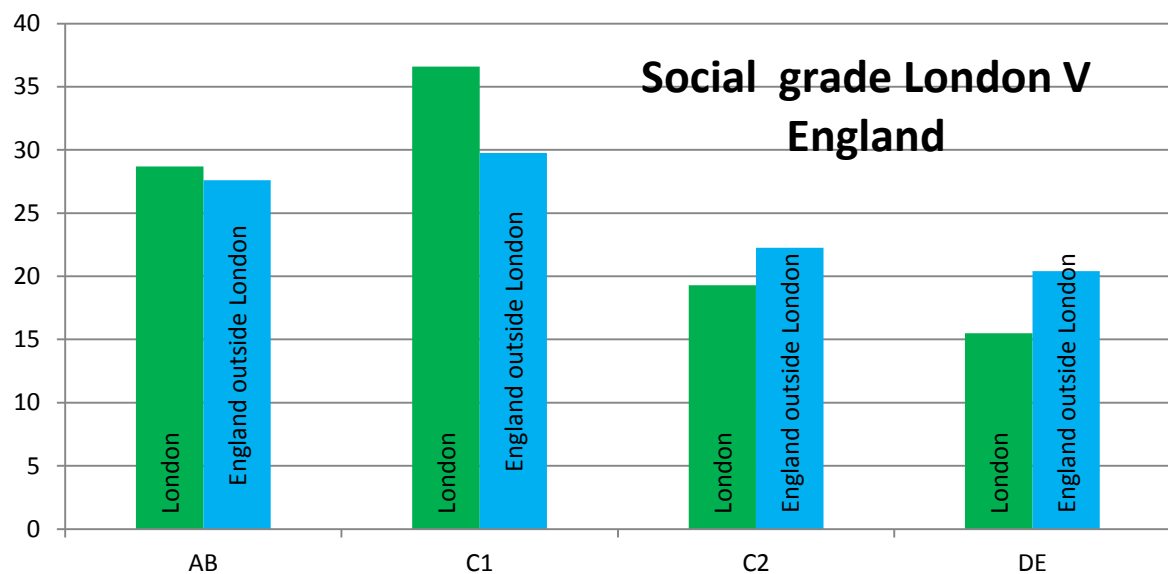


Q. What is the main journey purpose for bus passengers?



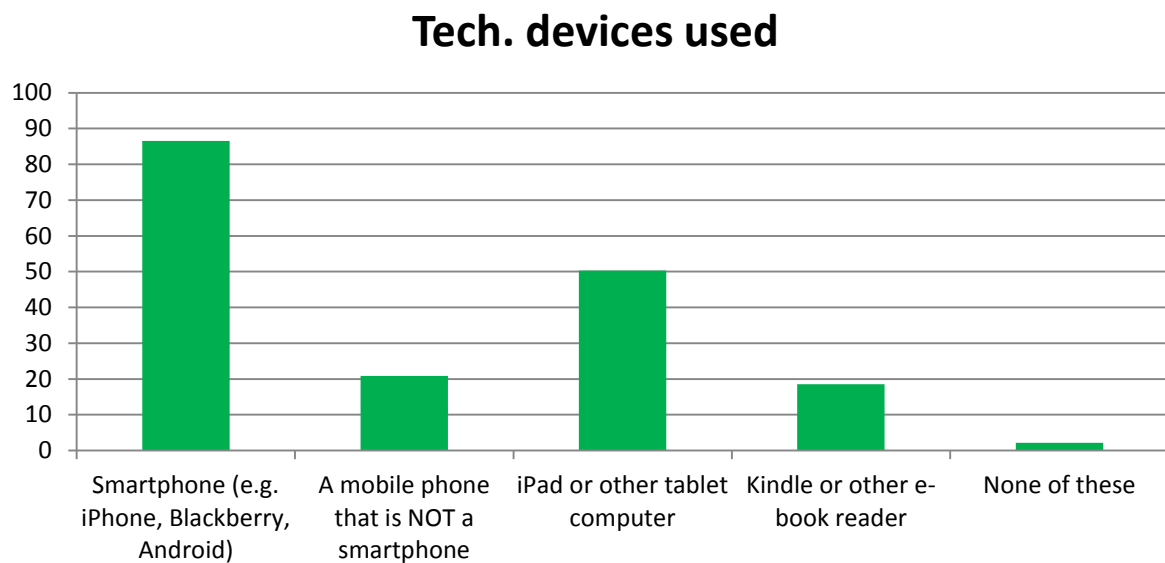
Most bus journeys are to and from work.

Q The social grade of passengers, both London and England outside London



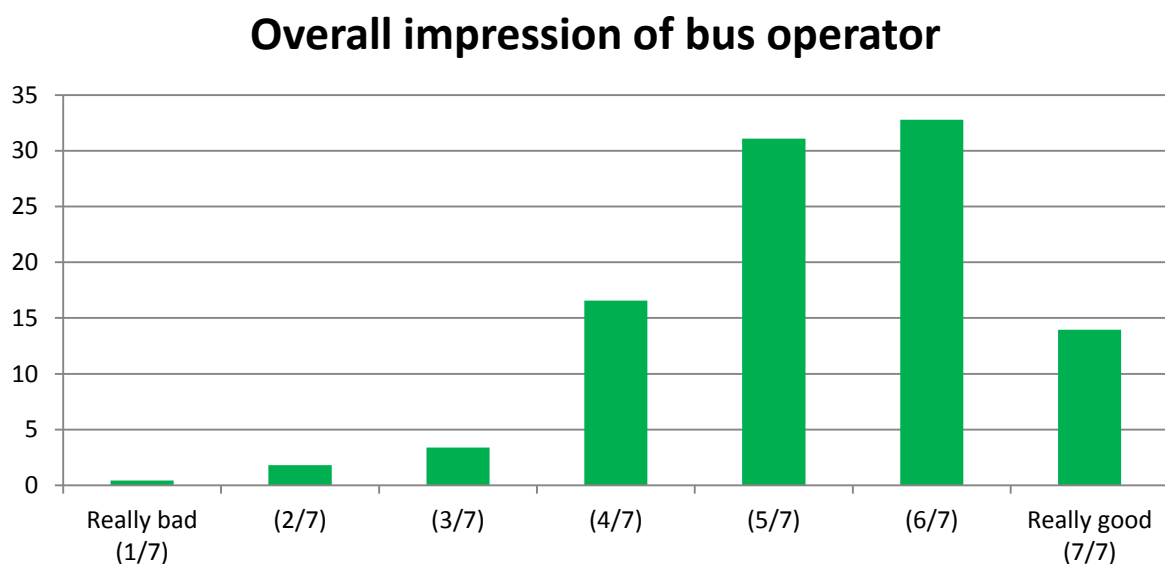
There is a noticeably higher percentage of social grade C1 passengers in London than England (outside London).

Q Which of a list of communication devices are passengers using?



Many bus passengers have access to modern communication devices, 87% have a smartphone..

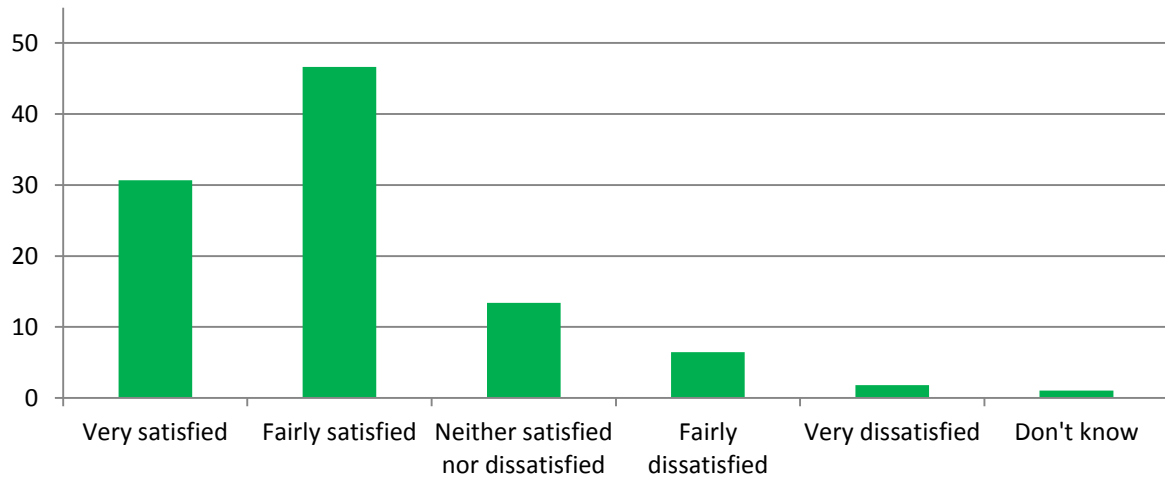
Q What's the overall impression passengers have of their bus operator?



The 47% of passengers rate their operator as good impression of their operator, scoring 6 or 7 out of 7.

Q Are buses going when and where passengers need them to go?

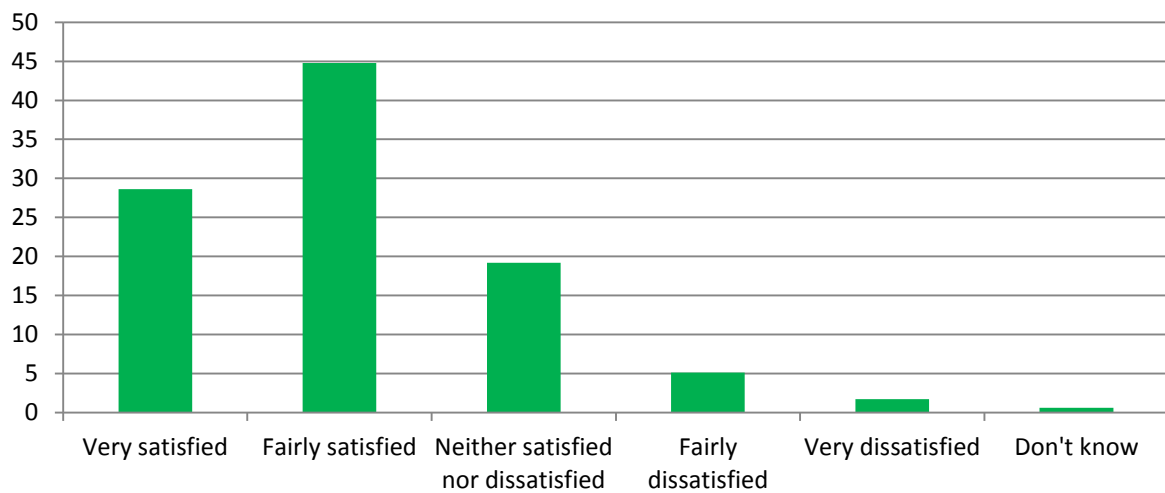
Buses going where you want to go?



77% of passengers are satisfied that buses serve the destinations they want to go to.

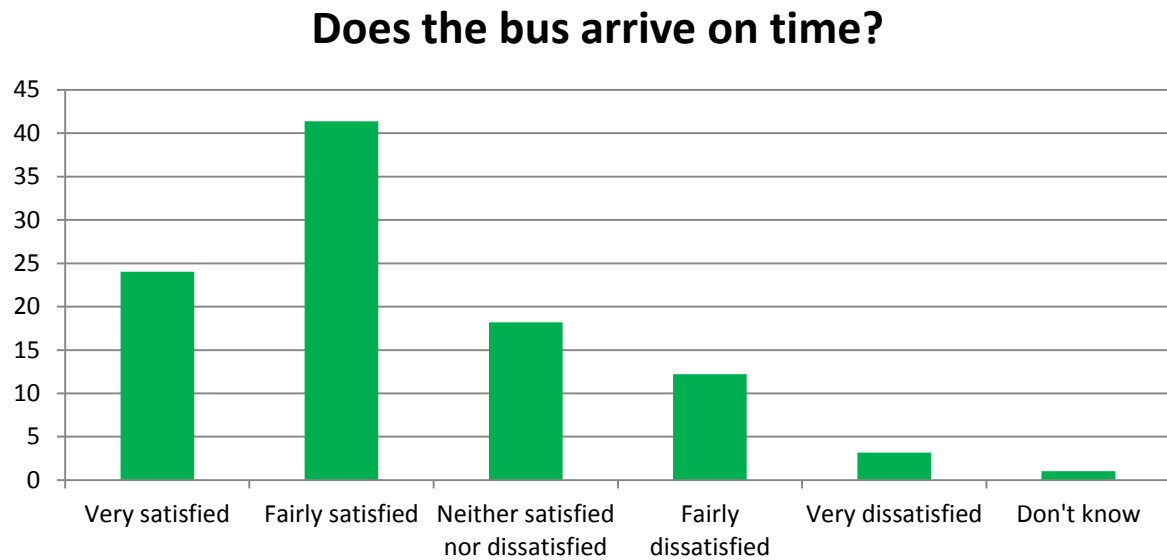
Q Are passengers satisfied with the bus stops they use.

Bus stops



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

Q Do the buses arrive when they should do?



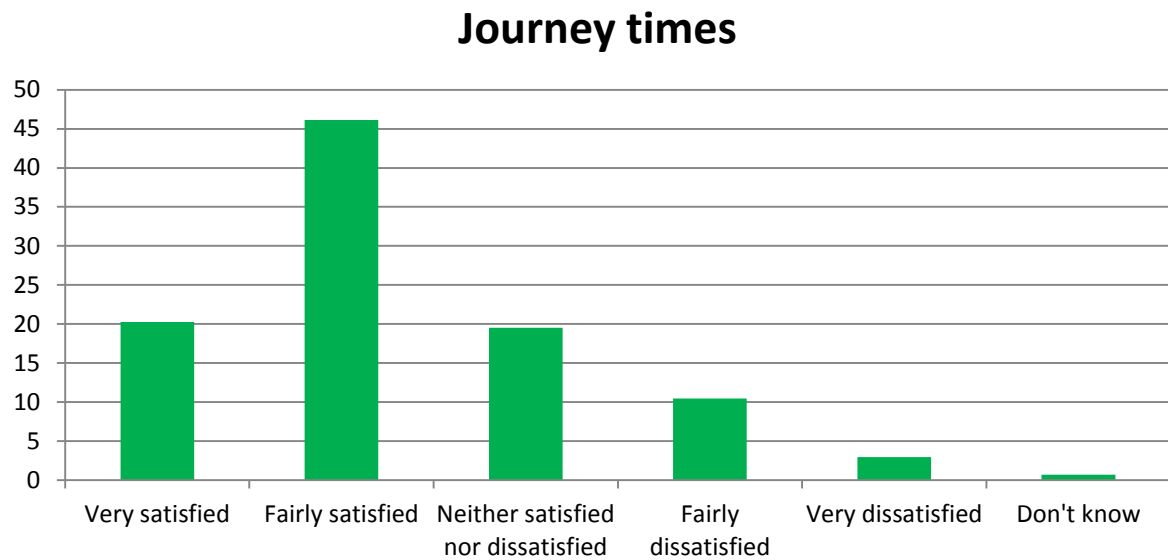
65% of passengers are satisfied that their buses turn up on time.

Q. How pleasant are passengers' journeys on the bus



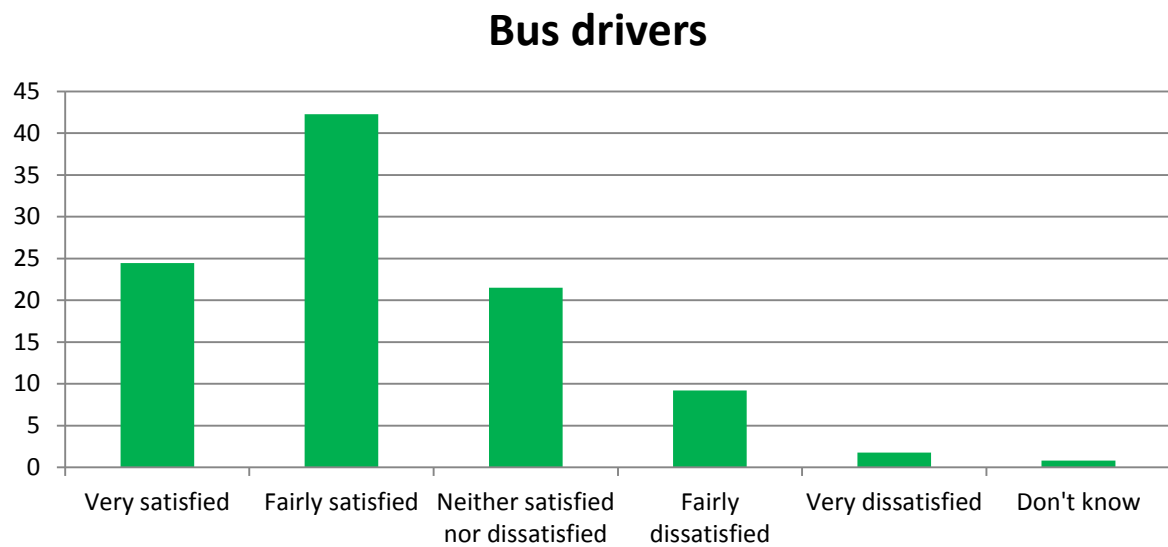
61% of passengers think their journeys on the bus are pleasant.

Q How satisfied are passengers with bus journey times?



66% of passengers are satisfied with journey times.

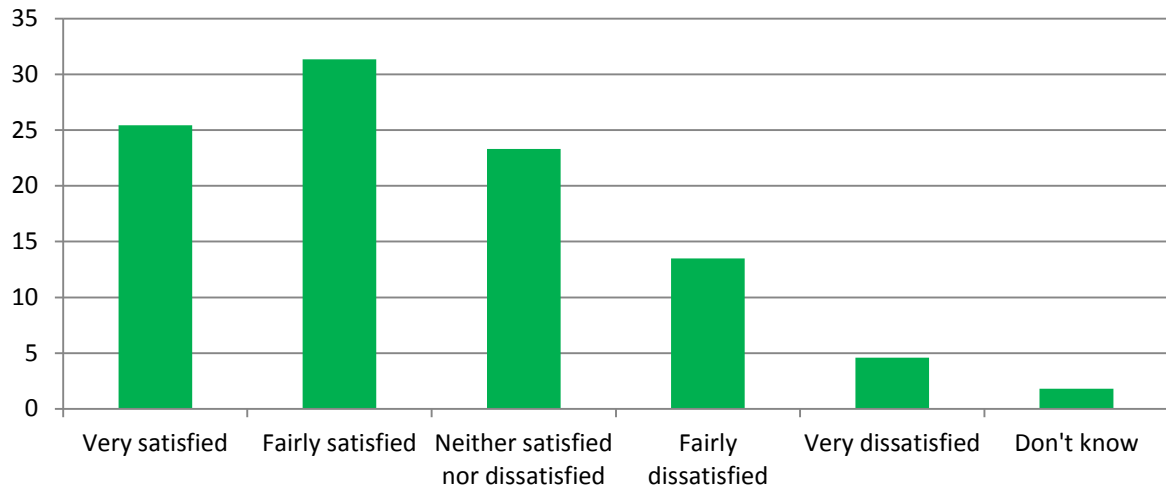
Q How satisfied are passengers with their drivers?



66% of passengers are satisfied with their drivers.

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

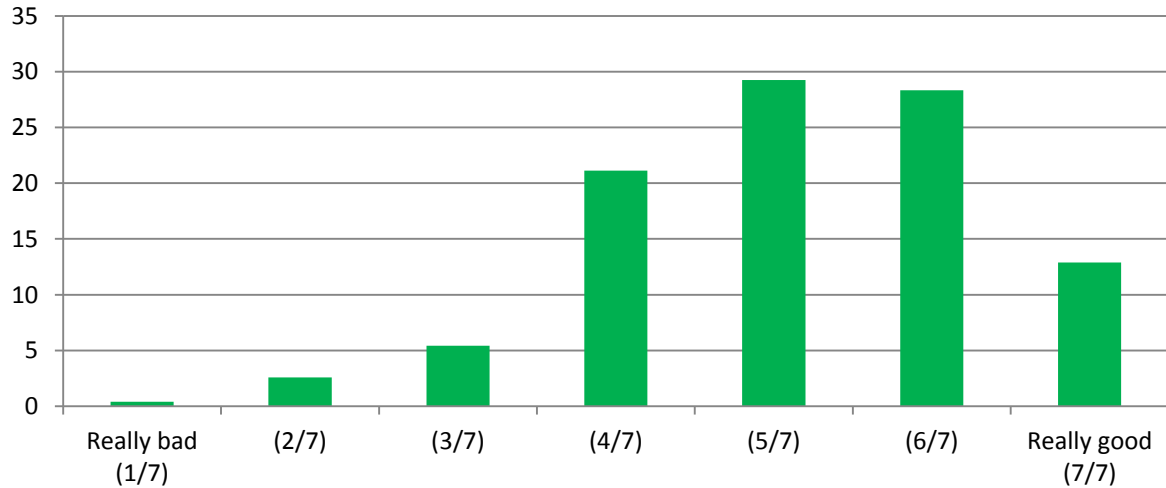
Value for money



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

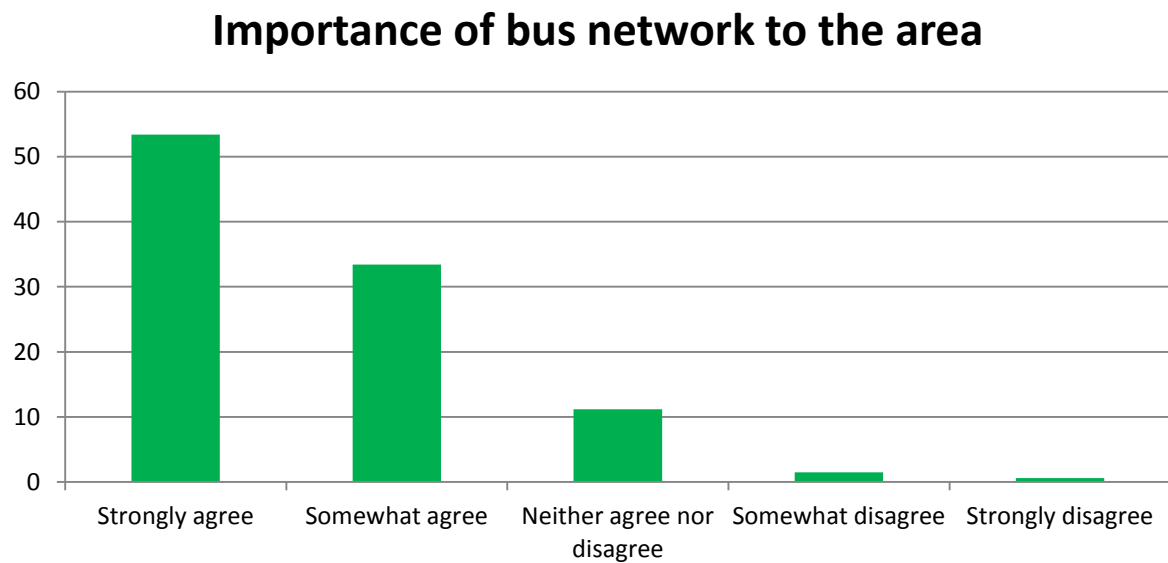
Q. All things considered, how much do passengers trust their bus operator?

Trust



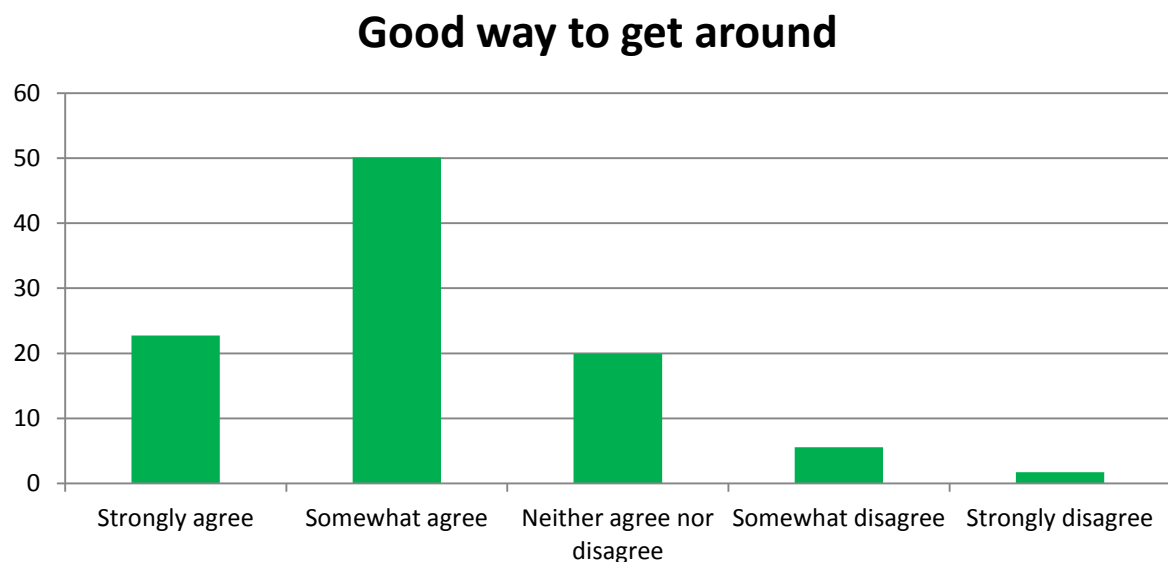
All things considered 41% of passengers trust their bus operator..

Q Do you agree that having a good bus network is important for the local area?



87% of passengers agree that having a good bus network is important for their local area.

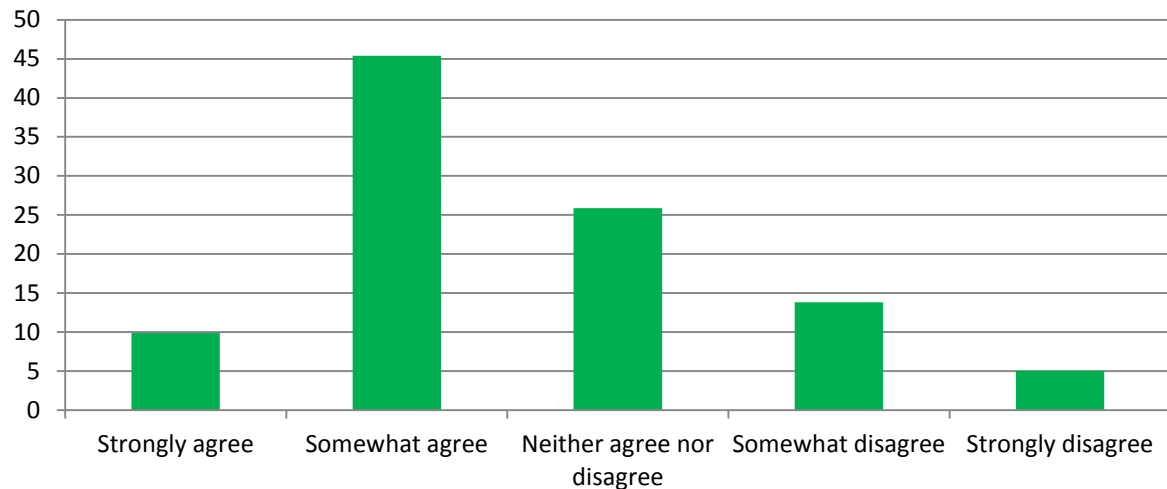
Q Do passengers agree travelling by bus is a good way to get around?



73% of passengers agree that travelling by bus is a good way to get around.

Q Do passengers agree the bus operator can be relied on to turn up when they say they will?

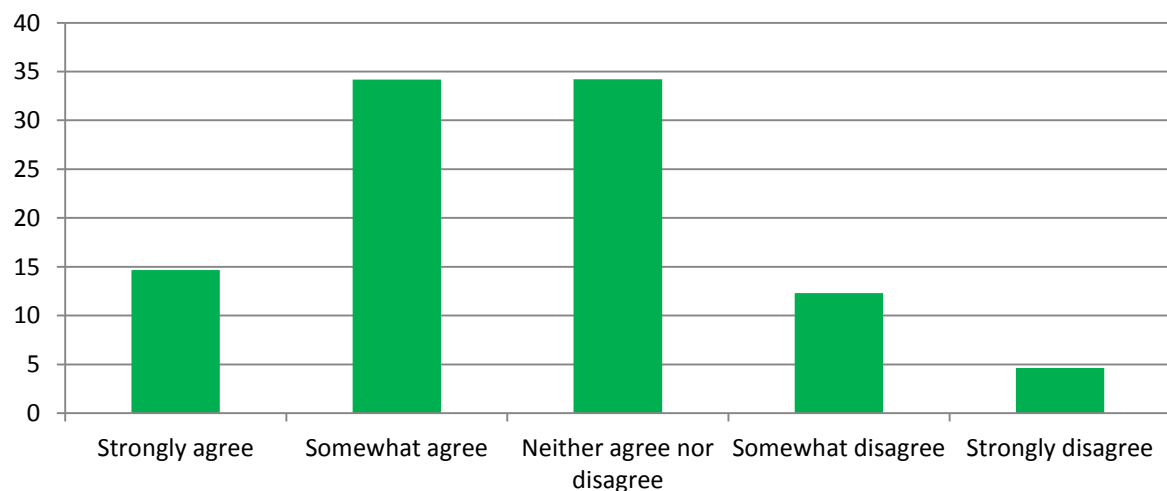
Reliability - turn up when they say they will



55% of passengers agree that their operator can be relied on to turn up when they say they will.

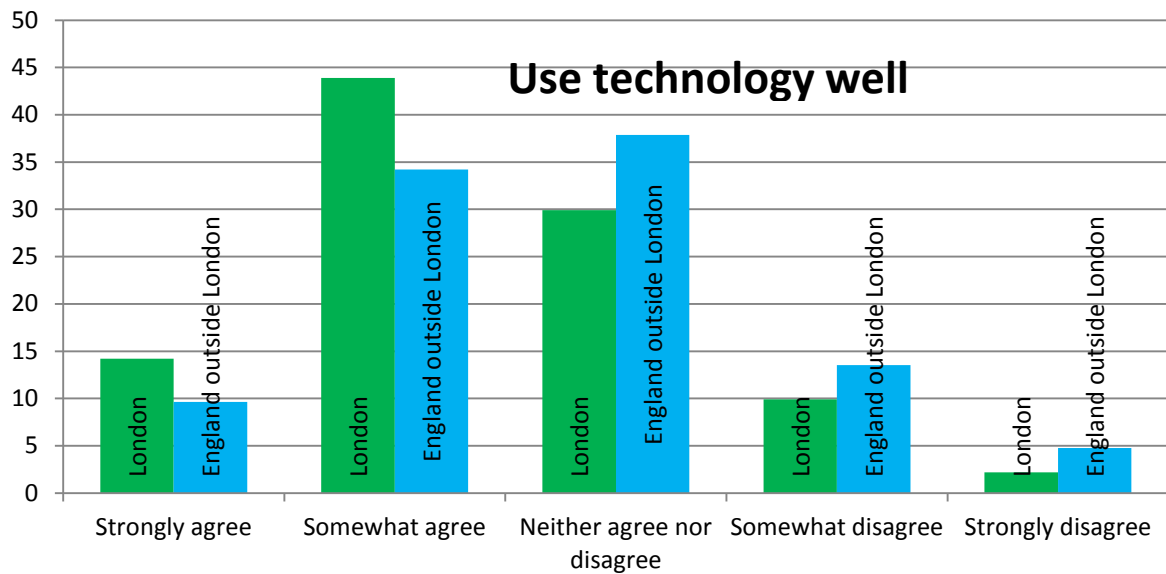
Q. Do passengers think that drivers that care about the standard of their driving?

Do drivers care about their driving standards



49% of passengers agree that drivers care about the standard of their driving, 18% disagree.

Q Does the operator use technology well for passengers' benefit? London versus England (outside London).



58% of passengers believe their bus operator uses technology well, but this is noticeably higher than outside London.

Participants were asked what improvements should be made to the bus services from a list of 31 possible improvements. More than one answer could be given.

Rank	Rank order	Share
1	More buses arriving on time at your bus stop	7.3%
2	Better value for money from bus journeys	7.1%
3	More journeys on buses running to time	6.7%
4	More effort made to tackle any anti-social behaviour	6.2%
5	Buses running more often than they do now	6.2%
6	Buses going to more places you want to go	4.7%
7	More bus stops with next bus displays	4.4%
8	Better security at bus stops so people feel safer waiting for buses	3.9%
9	Being given more/better information when delays occur on journeys	3.8%
10	Cleaner and better maintained buses	3.7%
11	Free wi-fi being more widely available	3.2%
12	Better quality information at bus stops	3.1%
13	Drivers allowing more time for passengers to get to their seats	2.9%
14	Tickets which better allow travel on all local bus companies	2.8%
15	More buses having next stop announcements/displays	2.8%
16	Drivers showing more consideration to passengers	2.7%
17	A smoother ride with less sudden braking or jolting	2.6%
18	More personal space on buses (whether seated or standing)	2.5%
19	Seats being more comfortable	2.4%
20	Shorter journey times on buses	2.3%
21	Improved ventilation and temperature control	2.2%
22	A more suitable range of tickets for how and when you use buses	2.1%
23	More seating being made available	2.1%
24	Being able to pay for bus travel with smartcards/ contactless cards/ mobile phones/ apps	2.1%
25	Improved display of route numbers and destinations on the outside of buses	1.9%
26	Improved information via apps/online on bus arrival/running times	1.8%
27	Drivers communicating better with passengers	1.6%
28	Making it easier to step on and off buses	1.5%
29	More space for wheelchairs and buggies	1.4%
30	Better maintained bus stops	1.1%
31	Being able to buy tickets from more places	0.9%

These priorities for improvement are similar to those that were highlighted in 2010. There is a difference between fare payers and concessionary passengers insofar as Wi-Fi is higher on the list for fare payers and Bus Countdown lower. This is indicative of the take-up of apps for next-bus information amongst younger passengers.

Value for money is, as one would expect, more important for fare paying passengers. Value for money has become more important to passengers than in 2010.

Better security at bus stops is, surprisingly, more important for fare paying passengers than concessionary passengers.

Participants were also asked what improvements should be made to the bus services so that more people would use them. More than one answer could be given.

Participants were asked for their own views, free text and the responses were coded. Below are the top ten as coded.

Cheap fares / keep ticket prices low / affordable	19.5
Greater frequency / more regular service / more buses	15.0
- Other	11.1
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

These responses are similar to those that were prompted in the previous question above. Affordability is clearly an important issue for bus passengers.