



Transport Focus - Bus Passenger Survey 2018

Committee Operations

Date of meeting 26 April 2019

Date of report 26 March 2019

Report by Senior Director

1. Object of report

To update the Committee on the results of Transport Focus's Bus Passenger Survey (BPS) 2018.

2. Background

- 2.1 Transport Focus¹ – previously known as Passenger Focus – is a UK-wide independent transport 'watchdog' which campaigns on behalf of public transport users and undertakes research and analysis.
- 2.2 In recent years, Transport Focus has carried out a Bus Passenger Survey across the UK to garner the views of passengers on a wide range of issues in relation to their experience of travelling by bus. BPS 2018 is the largest survey undertaken so far, with nearly 50,000 bus users from across the UK participating in it. The organisations which funded the Scottish element of the survey were Transport Scotland, some operators and the Regional Transport Partnerships of Scotland, including SPT.
- 2.3 The total number of people interviewed for the survey in Scotland was 8,000 and of those, 1,400 were in Strathclyde. The scale of the survey makes it a very useful source for evidencing the case for action and investment in our area. Similar to other regions, only larger bus operators took part in the survey and in Strathclyde, only Stagecoach and First Glasgow participated in 2018. Further, the operators participating in the 2018 survey differ from 2016, the last time the survey was undertaken, and therefore this needs to be considered when comparing changes between results.

3. Update

- 3.1 The full report of the BPS 2018 is available to download from the Transport Focus website². Attached at Appendix 1 is the 'Summary of key results in Scotland' from the BPS 2018, and at Appendix 2 is an excerpt from the full BPS report, giving detailed results for Strathclyde.

¹ <https://www.transportfocus.org.uk/>

² <http://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2019/03/13201611/Bus-Passenger-Survey-Autumn-2018-overall-report.pdf>

3.2 Key points to note from BPS 2018 for Strathclyde include:

- Overall satisfaction: This is high, with 90% of respondents being very or fairly satisfied with their journey by bus. This is broadly in line with the Scottish figure of 91%. It is worth noting however, that passengers who are commuting, passengers saying they have a disability, and passengers aged 16-34 were slightly less satisfied than passengers not commuting and passengers who are 'free' pass holders;
- On-bus journey time: Similarly, satisfaction with on-bus journey time is high at 90%, with congestion/traffic jams, passenger boarding times and road works being the most often mentioned reasons why there was a delay. Satisfaction levels varied by time of day of the bus journey, with 84% of passengers travelling in the AM peak period reporting being very or fairly satisfied with journey times compared to passengers travelling during PM peak (89%), off peak (91%) or weekend (92%);
- Punctuality: 78% of passengers reported being very or fairly satisfied with the punctuality of their bus service. Satisfaction with punctuality varied by time of day of the bus journey with 74% passengers travelling during the AM peak very or fairly satisfied compared to 85% travelling at the weekend. Around half of passengers reported that their wait time for the bus was about what they expected, but nearly one in ten passengers (9%) reported that their wait time was a lot longer than expected; and,
- Value for Money: 68% of fare-paying passengers reported being very or fairly satisfied with value for money. Satisfaction varied by type of ticket used with 57% using 'all-day' passes being very or fairly satisfied compared to those travelling on longer (e.g. weekly/monthly) passes (68%) and single/return tickets (76%). Satisfaction also varied by frequency of bus use with 65% who travel at least 5 days a week by bus being very or fairly satisfied compared to those travelling 3-4 days/week (70%) or 1-2 days/week (78%). The factors most influencing the value for money satisfaction rating were cost for distance travelled and cost of bus versus other transport.

3.3 Other interesting points from BPS 2018 include:

- 41% of respondents were travelling using a 'free' bus pass, and of those, 14% were travelling to/from work;
- 46% of fare-paying passengers and 47% of passengers using a 'free' pass reported that they chose the bus to make the journey because they had 'no option to travel by other means';
- 35% of bus passengers were making a multi-modal journey with 22% using 2 bus services to make their journey; and
- 65% of passengers checked bus arrival times before setting off on their journey or at the stop; of these, 40% checked the digital display at the bus stop and 43% checked the bus stop timetable.

4. Conclusions

4.1 The profile and 'voice' of the bus passenger appears, regrettably, to be all too often overlooked in discussions on public transport, with rail regularly dominating the debate. This is despite the fact that there are over 3 times as many bus journeys (338m³) made in Scotland as there are by rail (98m⁴) respectively. The BPS is

³ Scottish Transport Statistics No. 37 2018 edition

⁴ Scottish Transport Statistics No. 37 2018 edition

therefore a hugely useful tool in gaining valuable insight into how bus passengers view the services they rely on to go about their daily business, and in evidencing a case for change in bus. A key concern and challenge for policy-makers highlighted by the survey is the apparent disparity between the reality of bus patronage decline of 100m over the last 10 years, and the BPS 'overall satisfaction' rating being 91%.

- 4.2 Further, the BPS provides insight into key potential areas for improvement including: satisfaction for passengers who have a disability; punctuality of services in the AM peak travel period and value for money for passengers who are regular bus users. A range of measures are necessary to address these and other issues to ensure the needs of all passengers are catered for, and that fare-paying passengers have access to good value fares.
- 4.3 The data and insight gained from the BPS 2018 will provide a hugely useful input to the developing Regional Transport Strategy (RTS) and other areas of SPT's work, including working with Transport Scotland on the emerging Transport Bill, current and potential future partnerships with operators, work with councils such as Glasgow City Council on the Glasgow Bus Partnership and with North Lanarkshire Council on the outcomes of the recent Member Officer Working Group on bus.
- 4.4 In addition, discussions have begun with Transport Focus regarding some detailed surveys with current non-users of bus to establish evidence around reasons for this. This will be essential in understanding why non-users do not choose bus as well as why lapsed users have moved away from its use. Officers will continue to utilise the BPS 2018 in policy, strategy and project development, and will update members as work progresses.

5. Committee action

The Committee is recommended to note the contents of this report.

6. Consequences

Policy consequences	<i>The BPS 2018 will be a valuable tool in SPT's work, particularly in relation to the developing RTS.</i>
Legal consequences	<i>None.</i>
Financial consequences	<i>SPT's contribution to the cost of producing BPS 2018 was £3,635.</i>
Personnel consequences	<i>None.</i>
Equalities consequences	<i>The BPS 2018 has data which will assist in making the case for improvements to assist equalities groups.</i>
Risk consequences	<i>There remains an ongoing risk of continued decline in bus patronage, and this survey provides a valuable insight into measures which could mitigate this in future.</i>

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Bus Passenger Survey

Autumn 2018

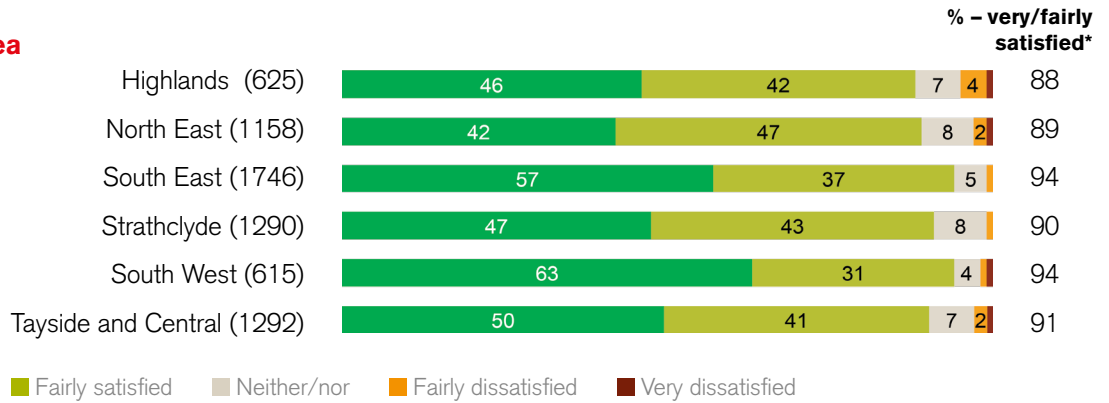
Summary of key results in Scotland

Key findings by area



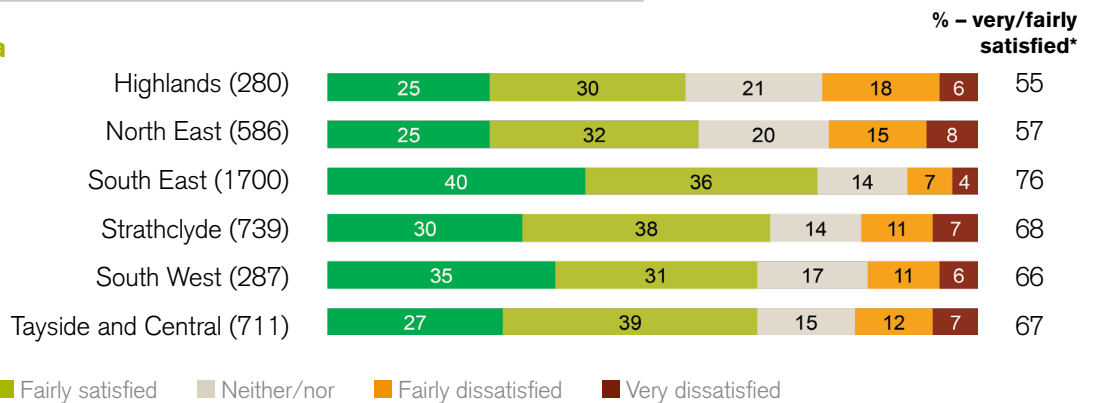
Overall satisfaction with the bus journey (%)

Results by area



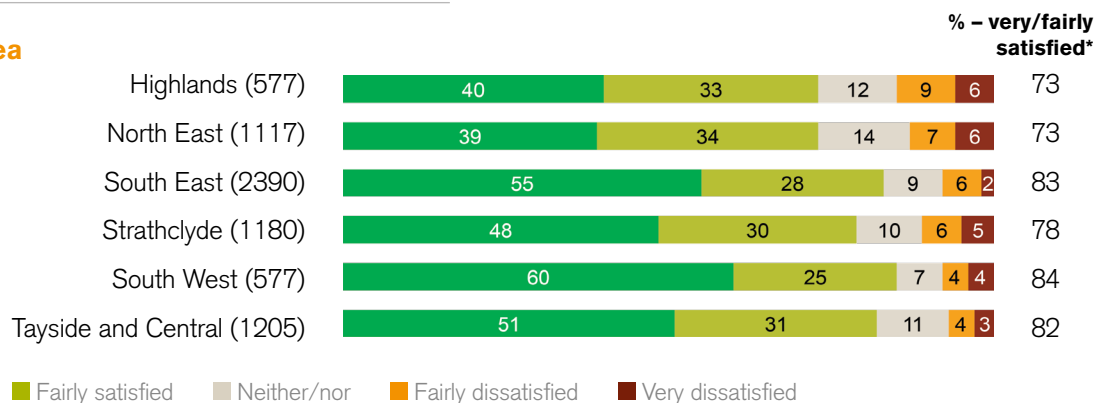
Satisfaction with value for money (%) – fare-paying passengers

Results by area



Satisfaction with punctuality of the bus (%)

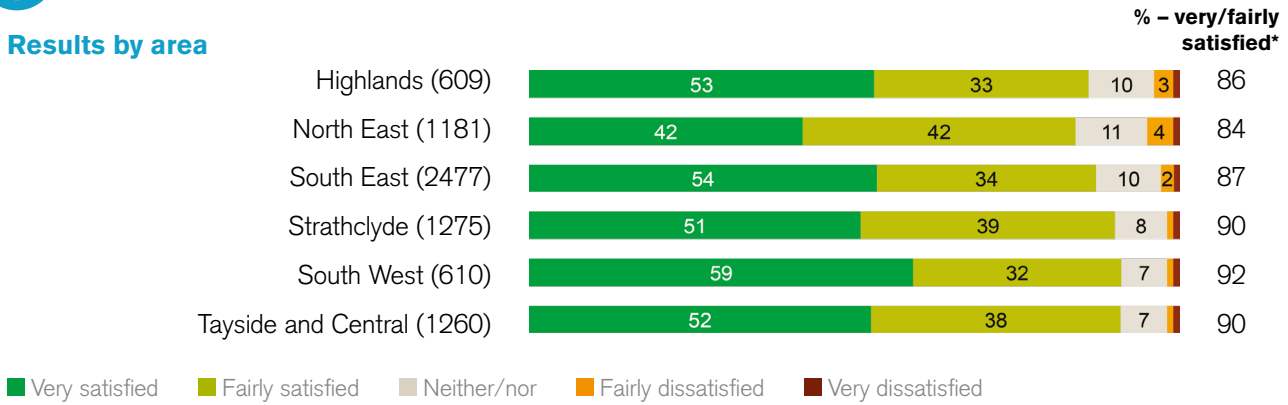
Results by area





Satisfaction with on-bus journey time (%)

Results by area



Factors affecting journey length – how this varies by area (%)

Overall satisfaction amongst key passenger groups – how scores vary by area

Reading the chart

The chart below shows the different factors affecting the length of time that passengers' journeys took and how these varied by the 6 regional transport partnership areas (listed on page 154). The white band shows the range of scores (the percentage of journeys affected) for each factor and the black dots mark the individual scores for each area. The highest and lowest scores are shown at each end of the white bands.

This shows, for example, that congestion/traffic jams tend to impact upon a higher percentage of journeys than roadworks, as the white band is further to the right. However, there is wider variation in scores for congestion/traffic jams than there is for roadworks.



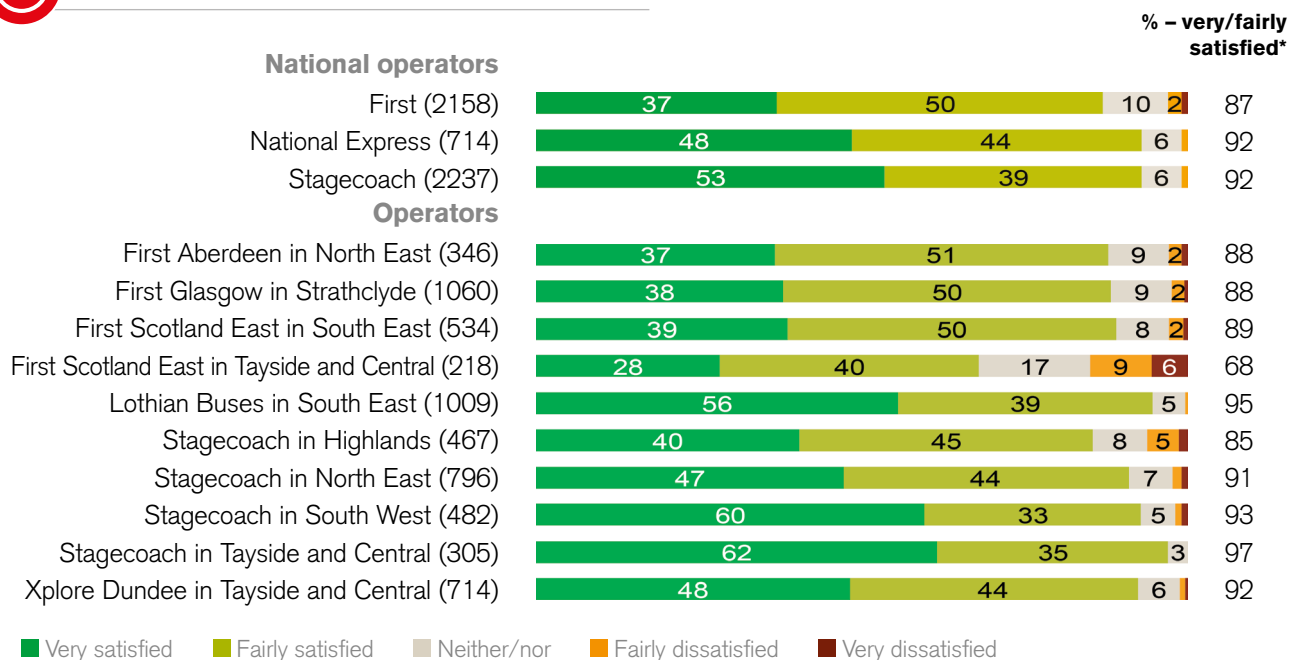
Q Was the length of your journey affected by any of the following?

Passengers could provide more than one answer

Key findings by bus operators



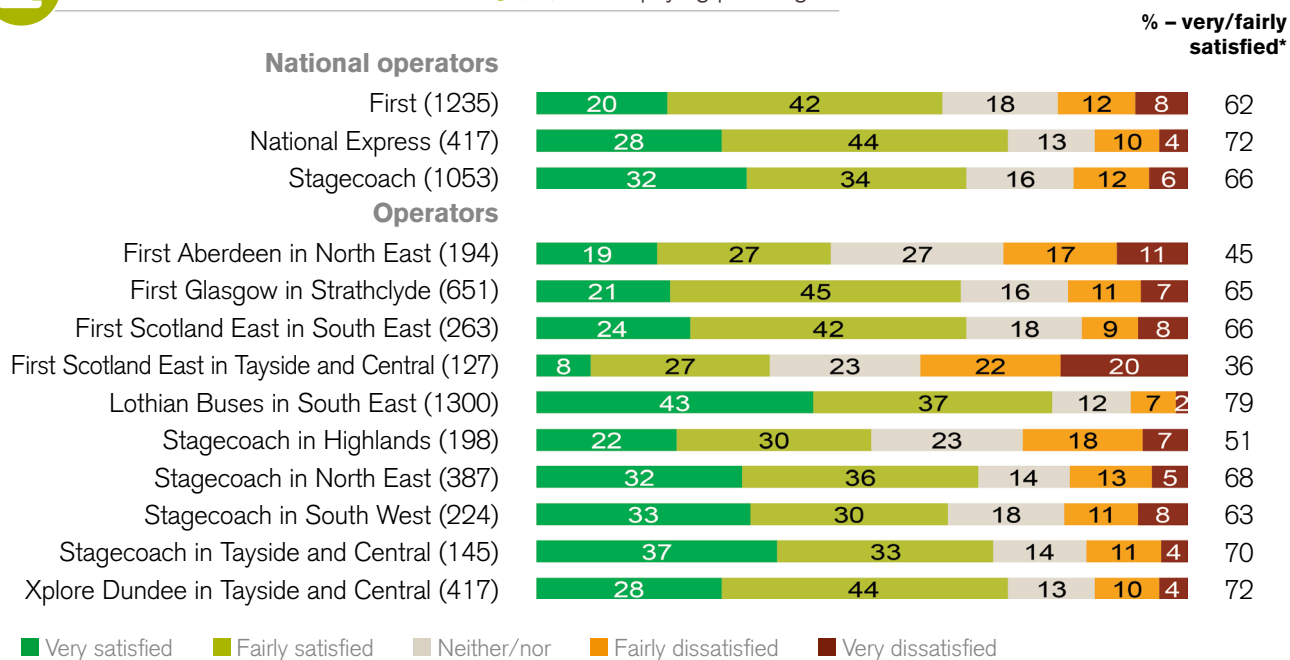
Overall satisfaction with the bus journey (%)



Q Overall, taking everything into account from start to end of the bus journey, how satisfied were you with your bus journey?



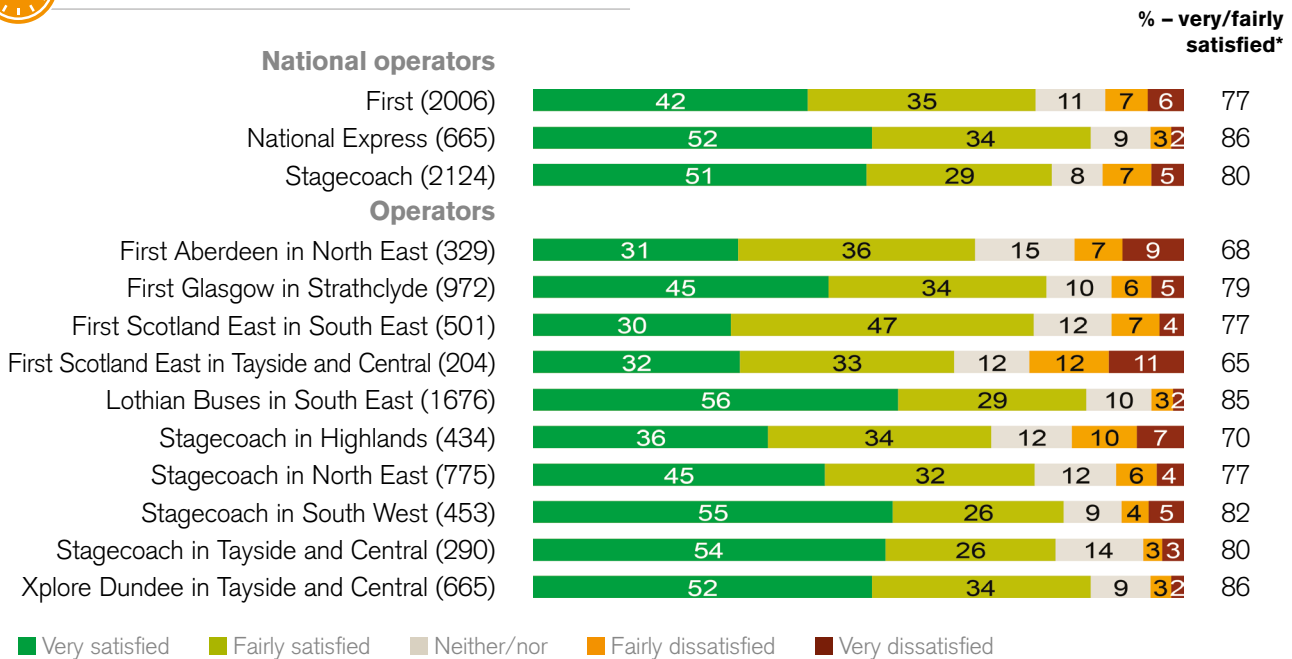
Satisfaction with value for money (%) – fare-paying passengers



Q How satisfied were you with the value for money of your journey?



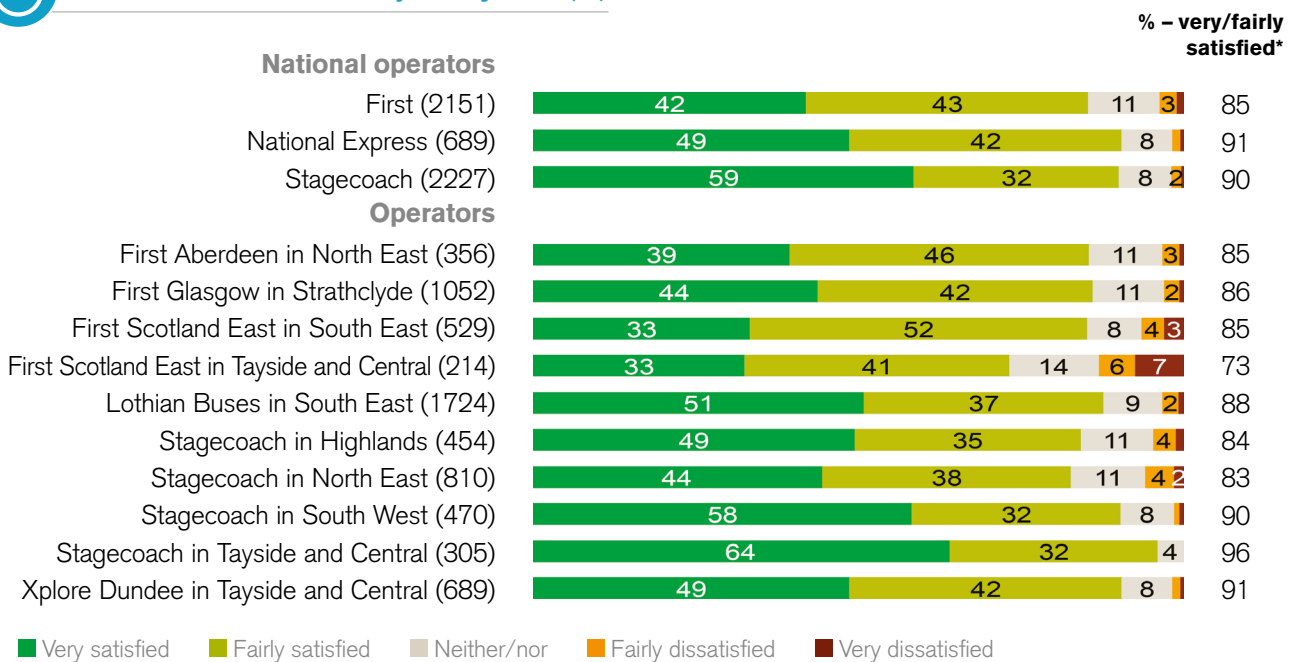
Satisfaction with punctuality of the bus (%)



Q How satisfied were you with the punctuality of the bus?



Satisfaction with on-bus journey time (%)



Q How satisfied were you with the length of time your journey on the bus took?

*Due to rounding the percentage very/fairly satisfied may not always be equal to the sum of the very and fairly satisfied values in the chart

Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- all users of England's motorways and major 'A' roads (the Strategic Road Network)
- rail passengers in Great Britain
- bus, coach and tram users across England outside London.

We work to make a difference for all transport users

This is a summary of the full survey report, which is available here:
www.transportfocus.org.uk/research-publications/research/bus-passenger-survey

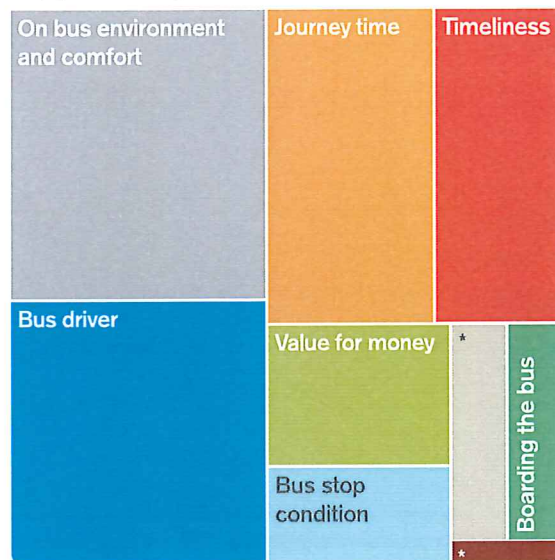
Strathclyde

Headline results



Which themes are affecting overall passenger satisfaction?

See page 190 for an explanation of how these themes were calculated



fare-payers only

Key results

Satisfaction (%)	2015 all satisfied	2016 all satisfied	2017 all satisfied	2018 all satisfied	2018 very satisfied	2018 fairly satisfied	2018 neither /nor	2018 all dissatisfied	2018 base size
Overall journey satisfaction									
All passengers	-	86	-	90	47	43	8	2	1290
Fare-paying passengers	-	84	-	89	43	45	9	2	767
Free pass holders	-	91	-	92	51	40	7	1	484
Aged 16 to 34	-	81	-	88	45	43	12	1	412
Aged 35 to 59	-	88	-	90	43	47	7	3	403
Passengers commuting	-	83	-	87	38	49	11	2	572
Passengers not commuting	-	89	-	92	52	40	7	1	651
Passengers saying they have a disability	-	88	-	86	44	42	11	3	327
Value for money									
All fare-paying passengers	-	64	-	68	30	38	14	17	739
Aged 16 to 34	-	61	-	66	32	34	15	19	375
Aged 35 to 59	-	68	-	68	26	42	13	18	323
Passengers commuting	-	63	-	66	28	38	15	19	470
Passengers not commuting	-	68	-	71	35	36	14	15	246
Punctuality and time waiting for bus									
Punctuality of the bus	-	78	-	78	48	30	10	11	1180
The length of time waited	-	78	-	80	48	33	10	10	1268
On-bus journey time									
Time the journey on the bus took	-	85	-	90	51	39	8	2	1275

Detailed results

Satisfaction (%)	2015 all satisfied	2016 all satisfied	2017 all satisfied	2018 all satisfied	2018 very satisfied	2018 fairly satisfied	2018 neither /nor	2018 all dissatisfied	2018 base size
The bus stop									
Overall satisfaction with the bus stop	-	79	-	82	40	42	12	6	1199
Its distance from the journey start	-	86	-	86	52	34	9	4	1209
The convenience/accessibility of its location	-	87	-	90	52	38	7	3	1108
Its condition/standard of maintenance	-	78	-	78	39	39	14	8	1122
Its freedom from graffiti/vandalism	-	77	-	81	47	34	12	8	1111
Its freedom from litter	-	73	-	76	42	35	12	12	1110
The information provided at the stop	-	73	-	76	37	39	14	10	1093
Your personal safety whilst at the stop	-	81	-	82	44	38	14	4	1110
On the bus									
Route/destination information on the outside of the bus	-	86	-	87	55	32	11	2	1243
The cleanliness and condition of the outside of the bus	-	79	-	82	38	44	13	5	1220
The ease of getting onto the bus*	-	-	-	91	54	37	8	2	1248
The length of time it took to board	-	89	-	92	56	36	7	1	1213
The cleanliness and condition of the inside of the bus	-	77	-	77	35	42	13	10	1300
The information provided inside the bus	-	66	-	70	30	39	24	7	1182
The availability of seating or space to stand	-	84	-	88	48	41	7	4	1251
The comfort of the seats	-	76	-	80	36	44	12	8	1245
The amount of personal space you had around you	-	76	-	81	39	42	12	7	1234
Provision of grab rails to stand/move within the bus	-	82	-	87	43	44	9	5	1229
The temperature inside the bus	-	74	-	82	40	42	11	7	1241
Your personal security whilst on the bus	-	82	-	85	46	39	13	2	1236
Ease of getting off the bus*	-	-	-	91	49	42	7	2	1234
The bus driver									
How near to the kerb the driver stopped	-	92	-	94	62	32	5	2	1250
The driver's appearance	-	90	-	92	57	34	7	1	1209
The greeting/welcome you got from the driver	-	74	-	76	44	32	18	6	1219
The helpfulness and attitude of the driver	-	74	-	79	45	34	17	5	1181
The time the driver gave you to get to your seat	-	76	-	79	45	34	16	5	1207
Smoothness/freedom from jolting during the journey	-	75	-	78	39	38	15	7	1221
Safety of the driving (i.e. speed, driver concentrating)	-	85	-	89	51	38	10	2	1193

Factors affecting journey time

Occurrence (%)	2015	2016	2017	2018
Congestion/traffic jams	-	18	-	15
Road works	-	13	-	13
Bus driver driving too slowly	-	4	-	2
Poor weather conditions	-	3	-	8
Waiting too long at stops	-	7	-	5
Passenger boarding time	-	16	-	15
Base size	-	2826	-	1368

Passengers could provide more than one answer

Anti-social behaviour

'Yes' (%)	2015	2016	2017	2018
Other passengers' behaviour giving cause to worry or feel uncomfortable	-	5	-	4
Base size	-	2671	-	1309

* New question in 2018