

Item:

14



Report to Partnership Meeting 13 April 2017

RESEARCH AND STRATEGY DELIVERY

Bus Passenger Survey – Highlands and Islands Results

Purpose of Report

To provide Members with a summary of the Bus Passenger Survey conducted in Autumn 2016 by Transport Focus. The survey was supported by HITRANS to ensure that a robust sample size was surveyed in the HITRANS area for the first time.

Background

Transport Focus have undertaken a Bus Passenger Survey in England since 2009 with it extended in 2014 to cover Scotland. HITRANS provided £2000 in match funding last year to help ensure that the survey included services within the HITRANS area (mainland) for the first time with over 622 people surveyed in the area and 10,000 across Scotland in total. This report introduces a summary of some of the key findings with a number of outputs from the survey attached as an appendix to this report.

Introduction

The survey was carried out between 5 September and 18 December 2016 and is a survey of bus passengers' journey experiences.

Key Findings

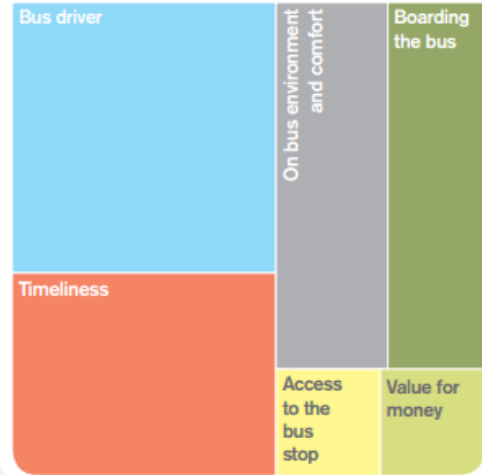
Highlands

Headline results



Which themes are affecting overall passenger satisfaction?

See page 170 for an explanation of how these themes were calculated



FARE-PAYERS ONLY

Key results

Satisfaction (%)	2013 all satisfied	2014 all satisfied	2015 all satisfied	2016 all satisfied	2016 very satisfied	2016 fairly satisfied	2016 neither /nor	2016 all dissatisfied	2016 base size
OVERALL JOURNEY									
All passengers	-	-	-	87	44	42	8	6	585
Fare-paying passengers	-	-	-	85	41	44	10	5	261
Free pass holders	-	-	-	89	49	40	4	7	316
Aged 16 to 34	-	-	-	81	33	47	12	7	154
Aged 35 to 59	-	-	-	87	43	44	9	4	144
Passengers commuting	-	-	-	78	38	39	12	11	162
Passengers not commuting	-	-	-	90	47	43	6	4	401
Passengers saying they have a disability	-	-	-	84	40	45	9	6	162
VALUE FOR MONEY									
All fare-paying passengers	-	-	-	62	24	38	17	20	259
Aged 16 to 34	-	-	-	58	22	36	19	23	137
Aged 35 to 59	-	-	-	67	21	46	17	16	108
Passengers commuting	-	-	-	57	17	40	18	25	129
Passengers not commuting	-	-	-	67	30	37	19	14	123
PUNCTUALITY & TIME WAITING FOR THE BUS									
Punctuality of the bus	-	-	-	71	36	35	13	16	564
The length of time waited	-	-	-	70	33	37	15	15	580
ON-BUS JOURNEY TIME									
Time the journey on the bus took	-	-	-	87	48	38	10	3	596

Attribute	HITRANS (% satisfied)	Scotland – Wide (% satisfied)
Punctuality	71%	80%
Journey Time	87%	85%

Value For Money	62%	68%
Overall Satisfaction	87%	90%

A copy of the full Bus Passenger Survey 2016 report can be found on the Transport Focus website <http://bit.ly/2nB9WzU>

Moray Council - Elgin Transport Strategy

The Moray Council undertook a pre-strategy consultation in developing the Elgin Transport Strategy in 2016. Of the 822 survey responses who said that they would find it difficult to use public transport to travel to work or the shops, the main reasons cited were;

- Infrequent/unreliable public transport;
- Public transport routes not covering area where respondent lived;
- Cost of using public transport;
- Travel time when using public transport;
- Need to use vehicle for work purposes

Recommendation

Members are invited to note the report and approve HITRANS support of the survey in the future as an invaluable evidence base for understanding passenger satisfaction for local bus services and supporting future policy development.

RTS Delivery

Impact - Positive

Comment – The Bus Passenger survey provides an evidence base for how local bus services can be best supported by HITRANS and its local partners.

Policy

Impact - Positive

Comment – Improving local bus services and encouraging more use of public transport are key priorities in the updated Regional Transport Strategy

Financial

Impact – HITRANS provided £2000 in funding to support the 2016 survey within the Highlands and Islands

Budget line and value – n/a

Equality

Impact – Positive

Comment – Improving local public transport helps improve social inclusion and helps provide access to employment and education for those without access to a private car.

Report by: Neil MacRae

Designation: Partnership Manager, HITRANS

Date: 4th April 2016

Bus Passenger Survey - autumn 2016 results

Highlands & Islands Transport Region (mainland)

Contact: Robert Pain, Insight Team, Transport Focus
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20 March 2017

Introduction

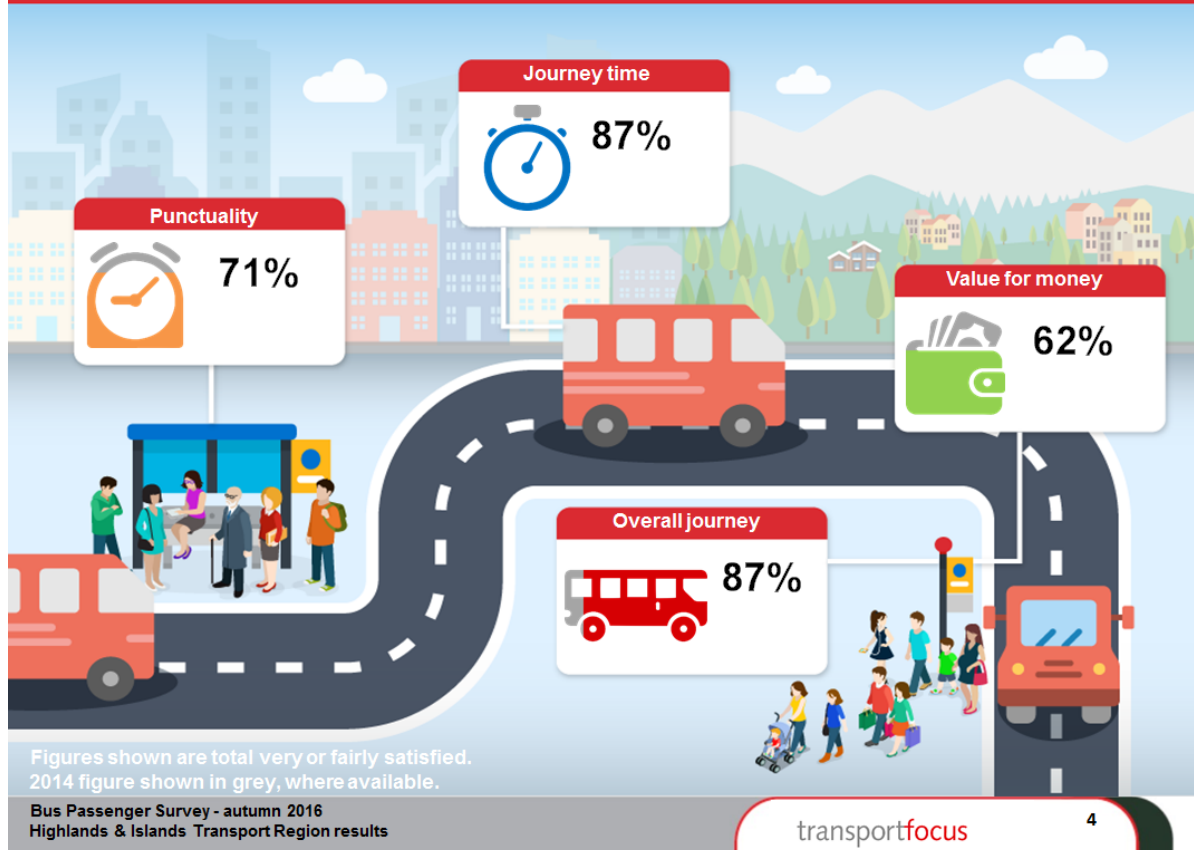
- 1) This is a survey of bus passengers' journey experiences.
- 2) It was carried out between 5 September and 18 December 2016.
- 3) Number of responses received for Highlands & Islands Transport Region was 622.

Results are representative at 'local transport authority' or 'operator defined territory' level.

Authority-type level (e.g. unitary) results are the aggregate of local transport authorities which are of that authority type or operator designated areas whose routes run mainly in that authority type. In calculating the aggregate result, each constituent authority or operator territory counts in proportion to its annual number of passenger journeys.

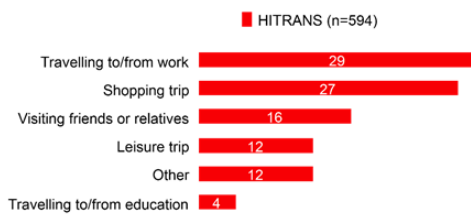
Further detail is provided in the final two slides of this presentation.

Key performance measures for Highlands & Islands Transport Region (mainland only)



Heading out: journey purpose and reason for choosing bus

Journey purpose

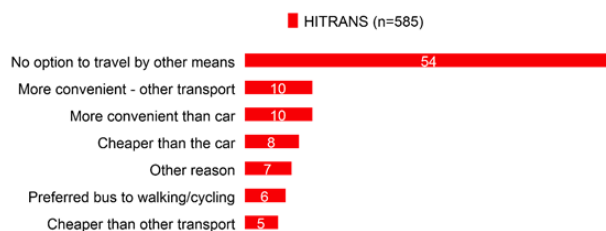


Filter: Year = 2016

Highlands & Islands Transport Region Trend figures and comparator

	2016	2016
Travelling to/from work	29%	39%
Shopping trip	27%	21%
Visiting friends or relatives	16%	12%
Leisure trip	12%	9%
Other	12%	10%
Travelling to/from education	4%	10%

Reason for choosing to take the bus



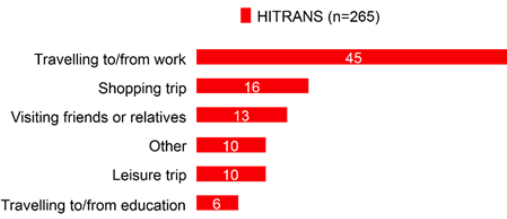
Filter: Year = 2016

	2016	2016
No option to travel by other means	54%	44%
More convenient - other transport	10%	14%
More convenient than car	10%	14%
Cheaper than the car	8%	6%
Other reason	7%	6%
Preferred bus to walking/cycling	6%	9%
Cheaper than other transport	5%	7%

Q. What is the main purpose of your bus journey today?
Q. What was the main reason you chose to take the bus for your journey today?

Heading out: journey purpose - fare-payers vs. free pass

Journey purpose - fare-payers

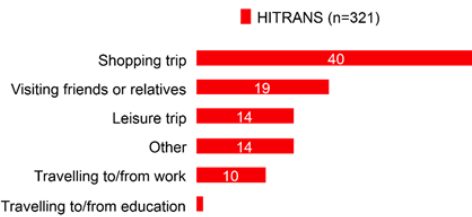


Filter: Year = 2016 - Multi = Fare-payer

Highlands & Islands Transport Region Trend figures and comparator

	2016	2016
Travelling to/from work	45%	52%
Shopping trip	16%	10%
Visiting friends or relatives	13%	8%
Other	10%	8%
Leisure trip	10%	7%
Travelling to/from education	6%	14%

Journey purpose - free pass holders



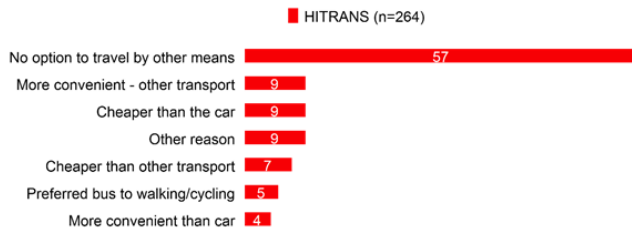
Filter: Year = 2016 - Multi = Free pass

	2016	2016
Shopping trip	40%	41%
Visiting friends or relatives	19%	18%
Leisure trip	14%	12%
Other	14%	13%
Travelling to/from work	10%	13%
Travelling to/from education	1%	3%

Q. What is the main purpose of your bus journey today?

Heading out: reason for choosing bus - fare-payers vs. free pass

Reason for choosing to take the bus - fare-payers

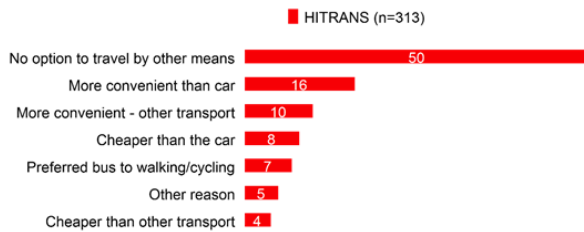


Filter: Year = 2016 - Multi = Fare-payer

Highlands & Islands Transport Region Trend figures and comparator

	2016	2016
No option to travel by other means	57%	44%
More convenient - other transport	9%	14%
Cheaper than the car	9%	6%
Other reason	9%	6%
Cheaper than other transport	7%	8%
Preferred bus to walking/cycling	5%	9%
More convenient than car	4%	13%

Reason for choosing to take the bus - free pass holders

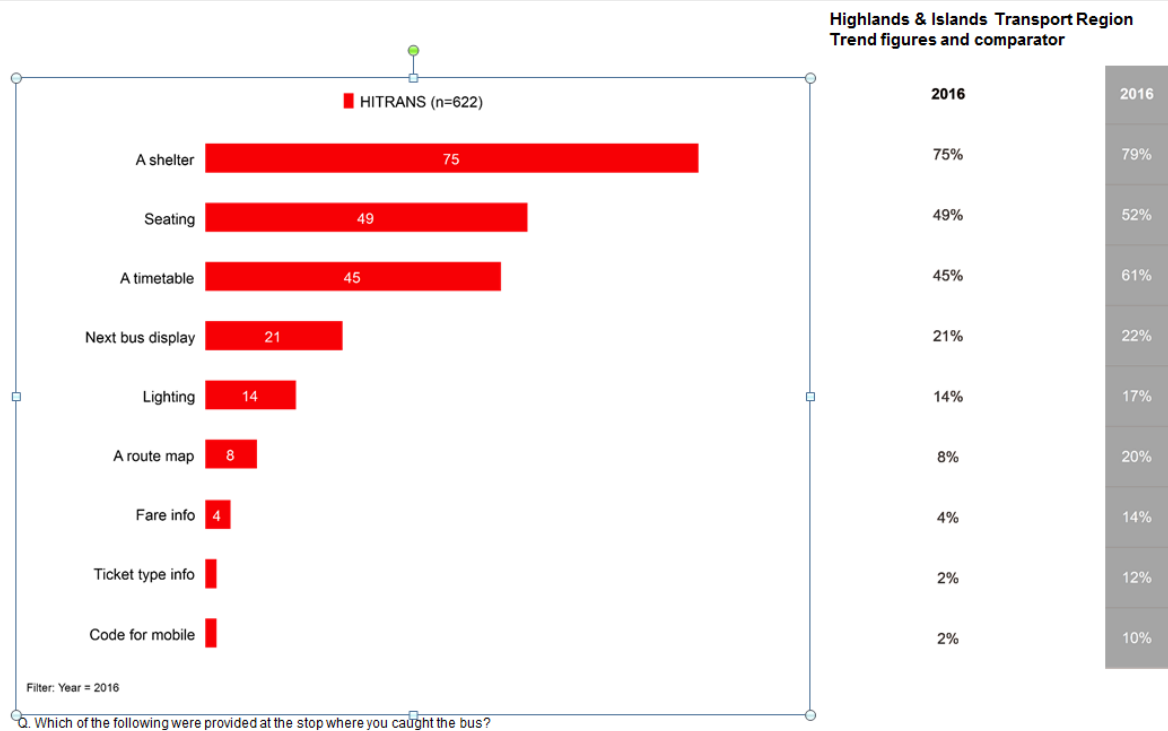


Filter: Year = 2016 - Multi = Free pass

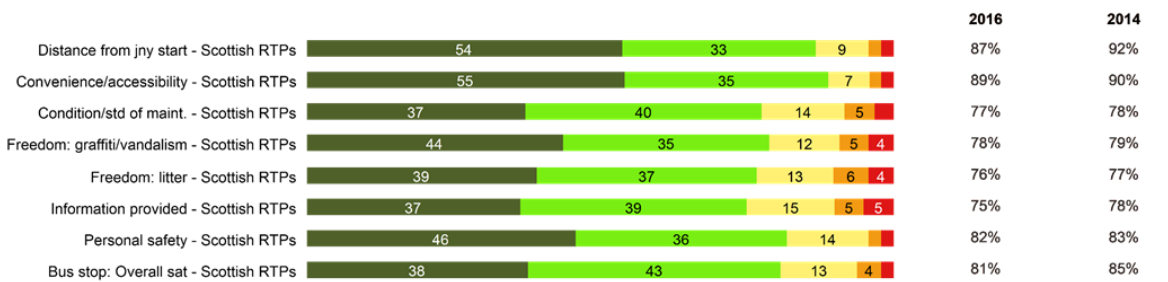
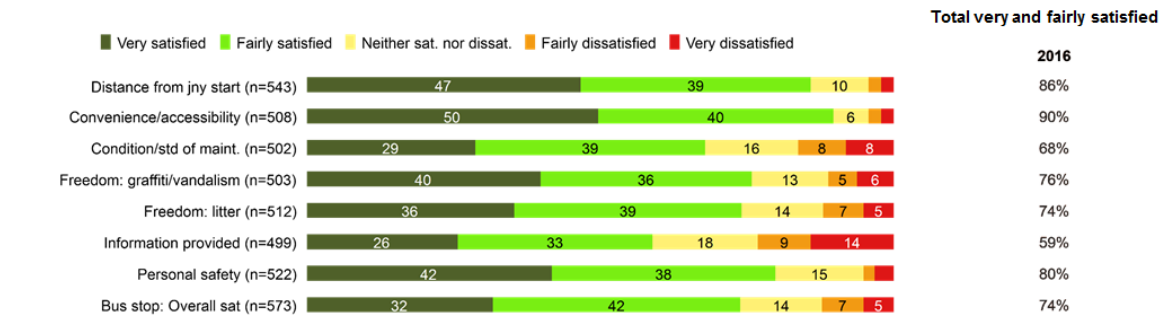
	2016	2016
No option to travel by other means	50%	45%
More convenient than car	16%	17%
More convenient - other transport	10%	12%
Cheaper than the car	8%	7%
Preferred bus to walking/cycling	7%	8%
Other reason	5%	6%
Cheaper than other transport	4%	5%

Q. What was the main reason you chose to take the bus for your journey today?

At the stop: presence of bus stop facilities



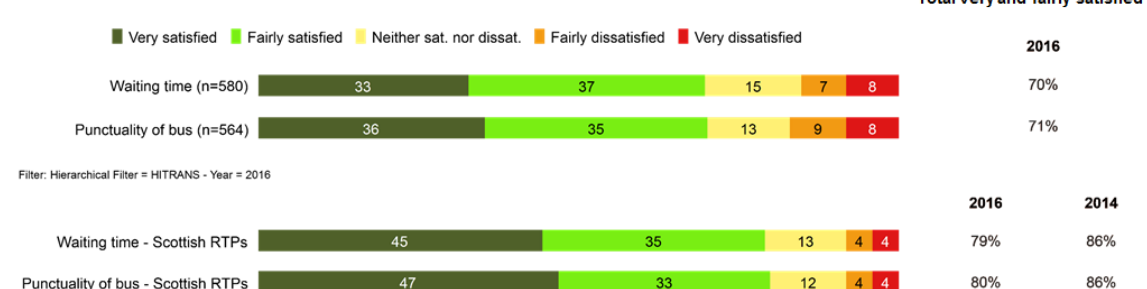
At the stop: satisfaction with the bus stop



Q. Thinking about the bus stop itself, how satisfied were you with the following?
 A) Its distance from your journey start e.g. home/shops; B) The convenience/accessibility of its location within that road/street; C) Its general condition/standard of maintenance;
 D) Its freedom from graffiti/vandalism; E) Its freedom from litter; F) The information provided at the bus stop; G) Your personal safety whilst at the bus stop; H) Overall, how satisfied were you with the bus stop?

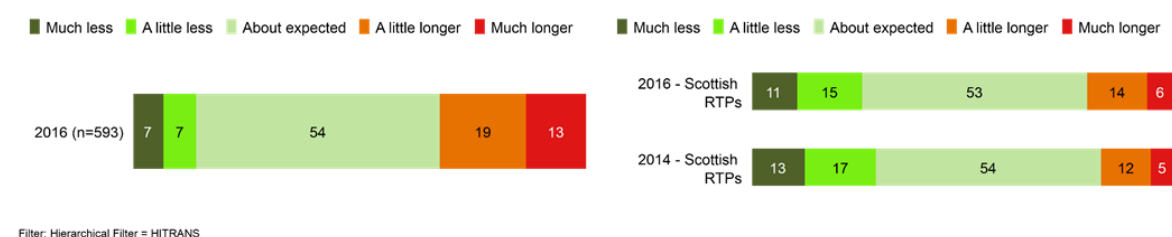
Waiting: waiting time and punctuality

Satisfaction with waiting time and punctuality



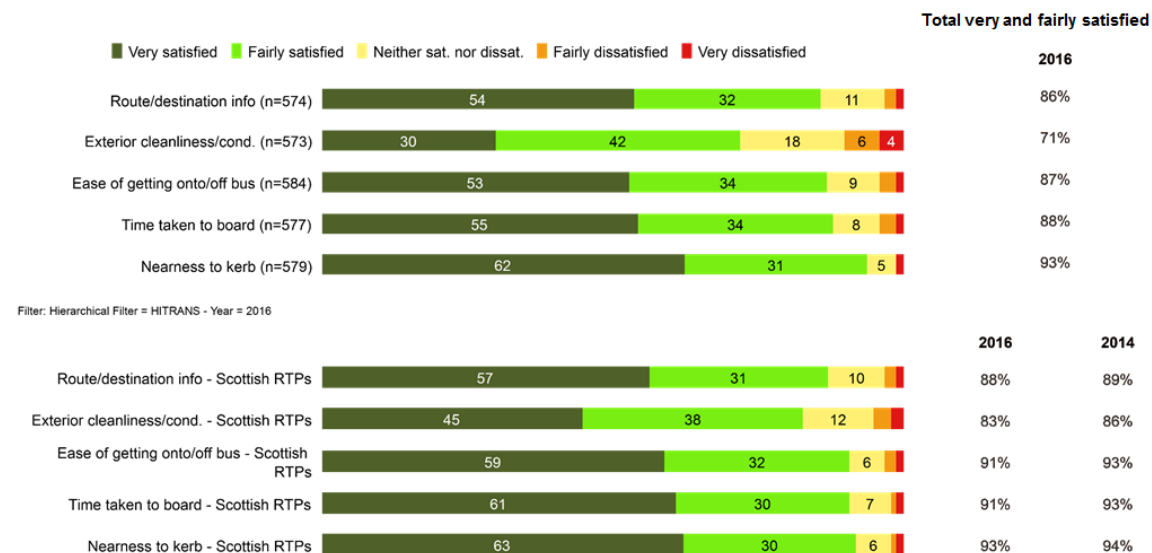
Q. How satisfied were you with the following: A) The length of time you had to wait for the bus; B) The punctuality of the bus.

How actual wait time compared with expectation



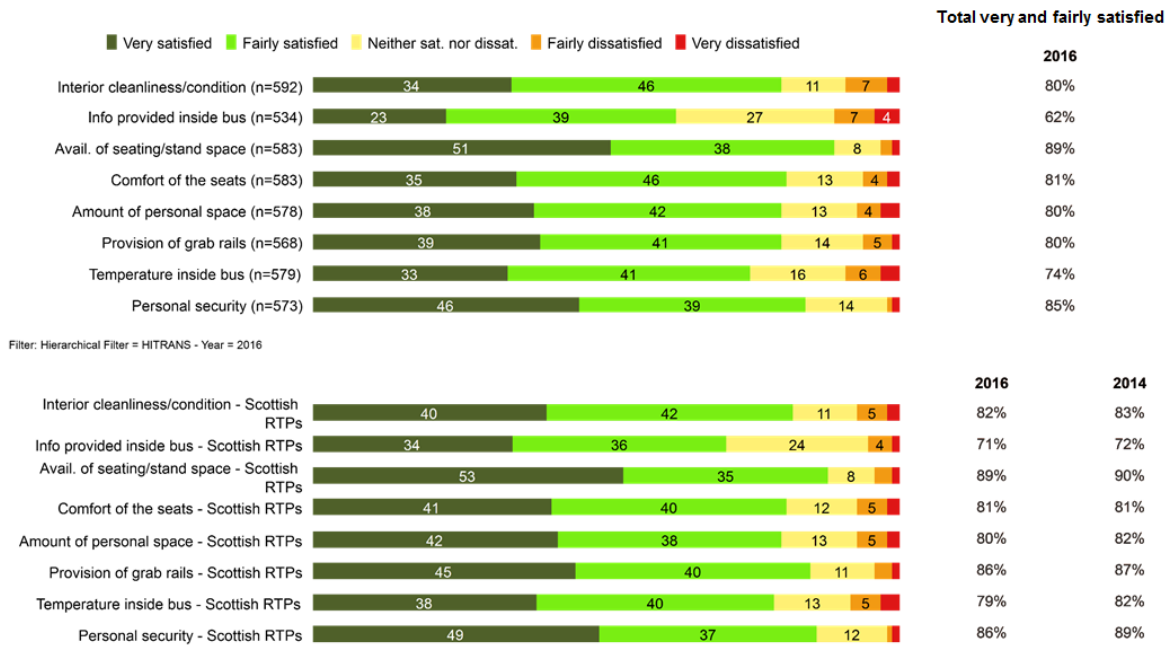
Q. Thinking about the time you waited for the bus was it: much longer than you expected; a little longer than you expected; about the time you expected; a little less time than you expected; a lot longer than you expected.

Boarding: bus satisfaction



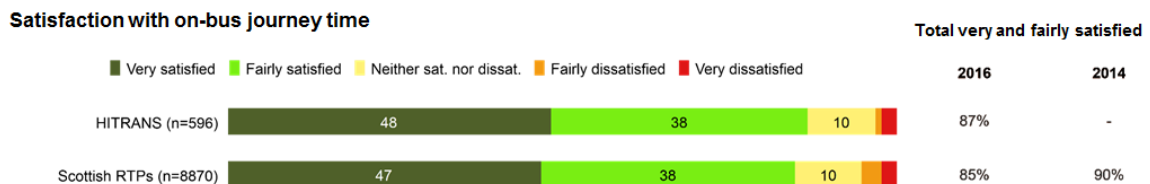
Q. Thinking about when the bus arrived, please indicate how satisfied you were with the following?
 A. Route/destination information on the outside of the bus
 B. The cleanliness and condition of the outside of the bus
 C. The ease of getting on to and off of the bus
 D. The length of time it took to board the bus
 Q. Thinking about the driver, please indicate how satisfied you were with each of the following?
 A) How near to the kerb/stop the bus stopped

On the bus: features, condition and space



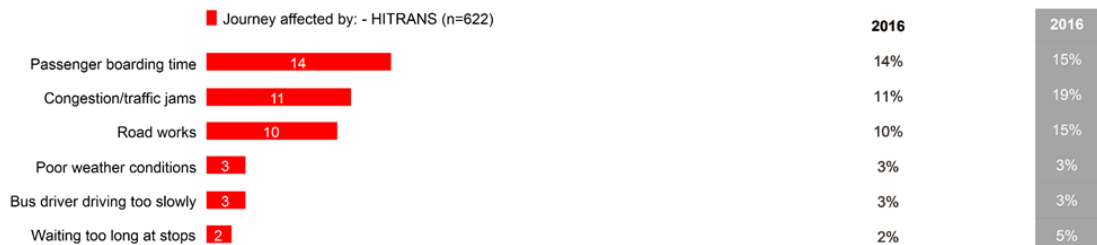
Q. Thinking about whilst you were on the bus, please indicate how satisfied you were with the following?
 A) The cleanliness and condition of the inside of the bus; B) The information provided inside the bus; C) The availability of seating or space to stand; D) The comfort of the seats;
 E) The amount of personal space you had around you; F) Provision of grab rails to stand/move within the bus; G) The temperature inside the bus; H) Your personal security whilst on the bus.

On the bus: journey time



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

What affected journey time?



Q. Was the length of time your journey took affected by any of the following? [note: multiple responses permitted]

Overall experience: What could be improved?

% passengers who wrote an improvement comment



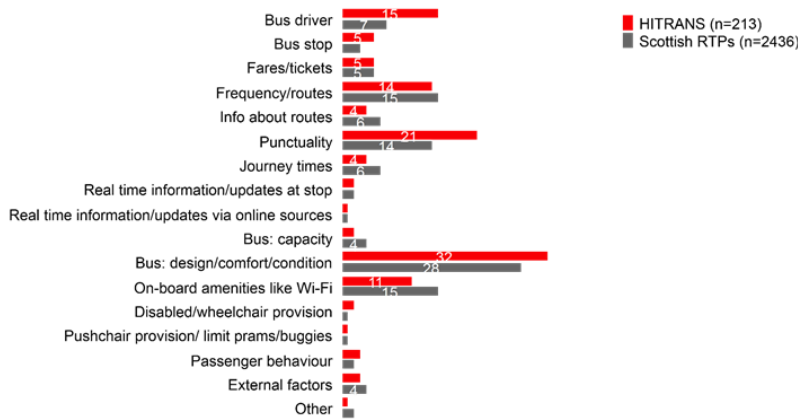
Filter: Year = 2016

% passengers who wrote nothing could be improved



Filter: Year = 2016

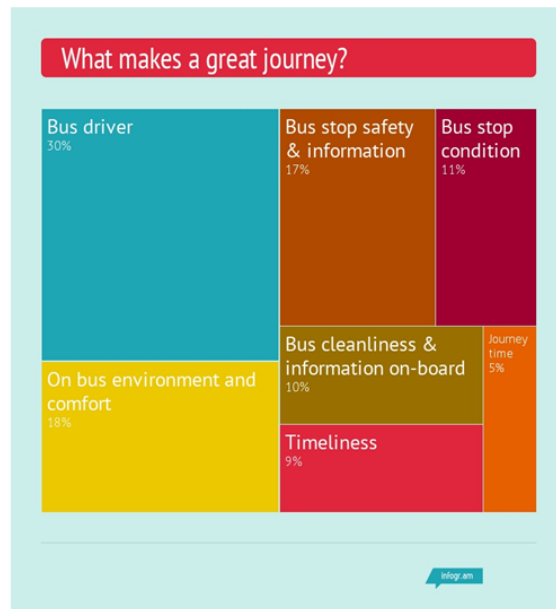
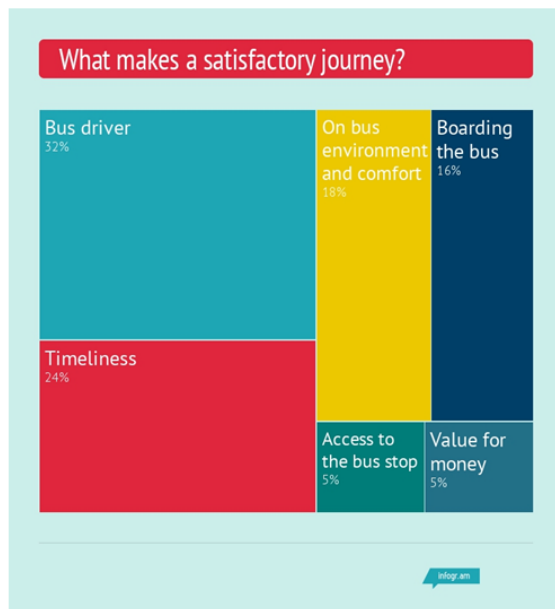
What could be improved - proportion of all those stating an improvement area



Filter: Year = 2016

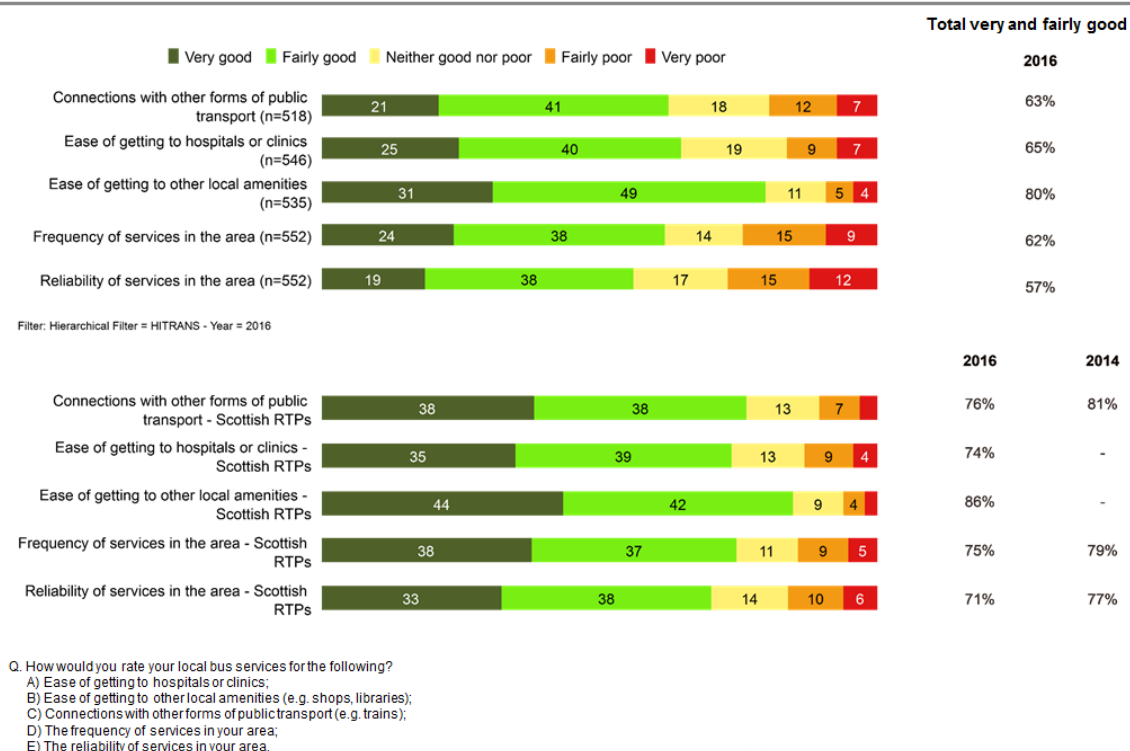
Q. If something could have been improved on your journey, what would it have been?

Overall experience: What makes a satisfactory or great journey?



Key Driver Analysis' looks at fare paying passengers' overall journey satisfaction response and their response to the 30 individual satisfaction measures in the survey (including value for money), which have been grouped into 10 themes based upon a statistical analysis of the responses. The left hand chart shows which themes most differentiate between those not satisfied and satisfied overall – making a journey 'satisfactory'. The right hand chart shows which themes most differentiate between those fairly and very satisfied overall – making a 'great' journey.

The bigger picture: ratings of bus services in general



Further detail (1)

Overview of methodology

The survey has been designed to provide results that are representative of bus passenger journeys made within each area, that is at the level of a transport authority, or a designated operator area.

The sampling method is 'systematic', derived from the list of the area's bus services and the times that they run (sourced from ITO World Ltd which makes available the data used on TraveLine). The bus service/start times selected from the sampling process formed the mid-point for a three-hour fieldworker shift, that is, the shift started one and a half hours earlier (or as close to this as was practicable) on the same route and from the same start point as the service selected. During this three-hour shift, field workers made as many return trips as possible on that selected service. They discussed the survey with the boarders of that bus service and gave all passengers the chance to participate.

Those wishing to take part were offered two options: to take a self-completion paper questionnaire together with a reply-paid envelope, or to provide their email address so that an online version of the questionnaire could be emailed to them. All questionnaires referred to the journey they were making at the time, and they were asked to complete it after their journey.

Fieldwork was conducted between 5 September and 18 December 2016 (excluding the half term holiday period). Services available for selection were those running between 6am to 10pm, seven days of the week; only school bus services were systematically excluded. The survey was conducted among passengers aged 16 or over.

Response data were weighted in two stages: the first was to weight to the age, gender and 'daypart' profile of bus passengers within each area ('dayparts' are morning peaks, weekday offpeaks, evening peaks, and weekends). As there was no available data at area level on the age/gender/daypart profile of passengers this was estimated: for age and gender the profile of passengers was recorded on two occasions during each fieldwork shift. For daypart, the total number of boarders was counted on a representative sample of all surveyed bus services (in a separate exercise) and this was used in a model which predicts the number of passengers on all services; from this it was possible to establish the proportion of passengers travelling in each daypart for each area. The second stage was at area level to ensure that in the final data each participating area (within the survey) was represented in proportion to its total annual journey volume. Journey volume information was sourced from the DfT's published statistics, and in a minority of cases with input from operators.

Transport Focus was supported by BDRC Continental Ltd in conducting the autumn 2016 survey. There is an accompanying methodology document that provides more detail on the survey process, available at www.transportfocus.org.uk.