

**ENGLAND'S
ECONOMIC
HEARTLAND**

**Analysis of survey on
attitudes to bus travel in the
EEH region**



SUMMARY OF MAIN FINDINGS



The survey of more than 7,000 people aged over 16 in the EEH region highlighted:

- 60% of people who had used a bus in the last 12 months rated the quality of their local bus service as 'good'.
- Uncompetitive journey times (particularly when compared to other modes) was the biggest reason why people were put off from travelling by bus.
- The cost of fares was another important factor consistent across age groups and income levels, while frequency, convenience/ availability of routes, reliability and comfort were also important factors.
- While responses were broadly consistent amongst gender, income level and location, there were some marked differences in attitudes between people of different ages. Factors such as information, crowding, ticketing and availability of nearby bus stops were considerably more important to people under the age of 45.
- The survey also suggested that there was an appetite, particularly amongst younger people, to use buses if the service offering improved. Only 5% of under 45s said 'nothing' would encourage them to use buses more, compared to 11% of those aged 45-54 and 20% of over 55s.
- 75% of respondents said they would support integrated ticketing, with more than half saying they planned to make a multimodal journey by public transport in the next year.

A detailed breakdown of the responses – including at local authority level – is available for our partners.

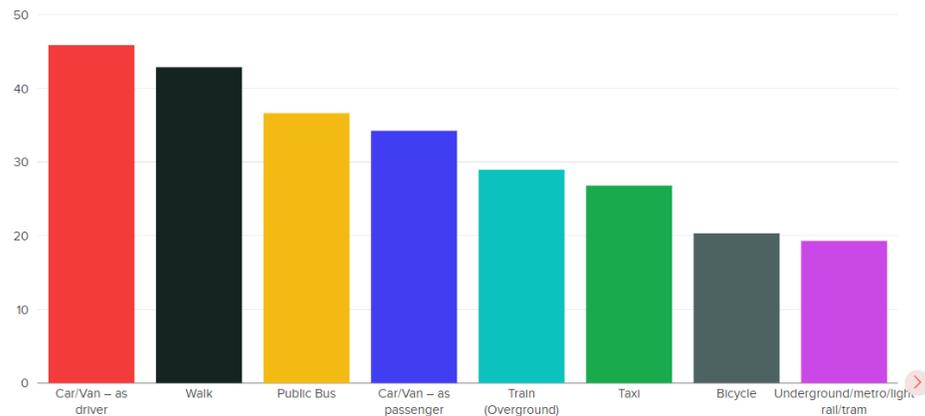


ABOUT THE SURVEY

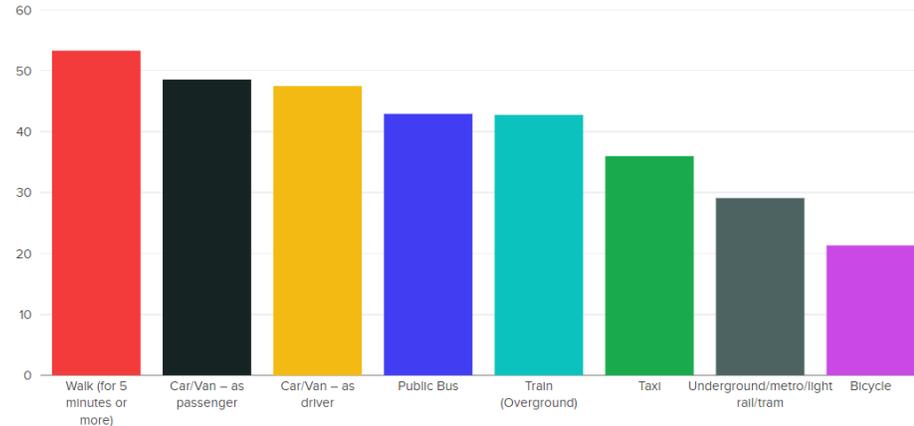


Market research agency Census Wide carried out the survey via an online questionnaire in January 2023. A total of 7,002 people from across all parts of the EEH region took part. More women (60%) participated than men, while most respondents were of working age and there were a range of income levels. 95% of respondents had some experience of using a bus and 37% had used a bus to travel to work within the past year, while 43% had used a bus for reasons other than commuting. Half of respondents described where they lived as 'suburban', with 25% each from rural and urban locations.

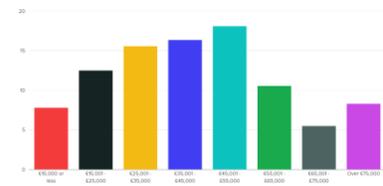
Q1: What, if any, methods of travel have you used in the last 12 months to commute for work within England only? (Tick all that apply)



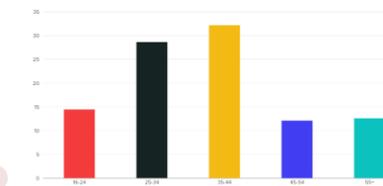
Q2: What, if any, methods of travel have you used in the last 12 months outside of commuting (e.g., leisure, meeting people, errands etc) within England only? (Tick all that apply)



Q3: Which of the following best reflects your annual household income?



Q4: What is your age group?

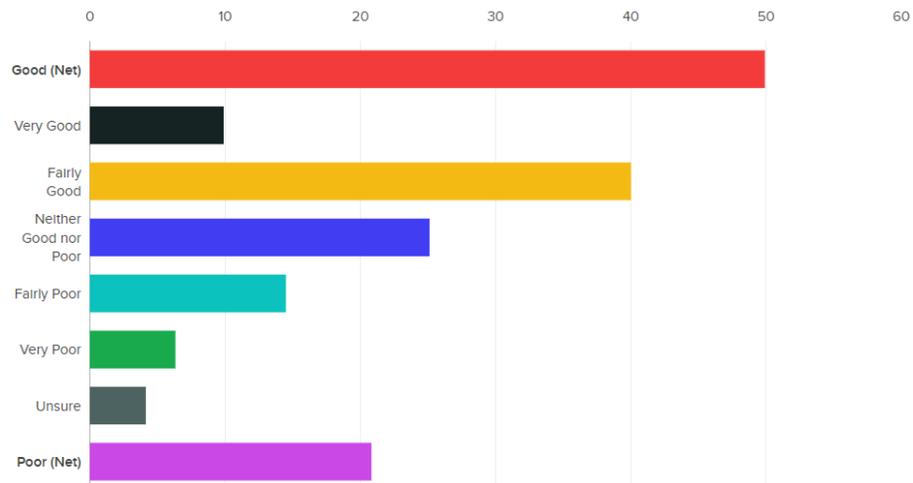


PERCEPTIONS OF THE CURRENT OFFER

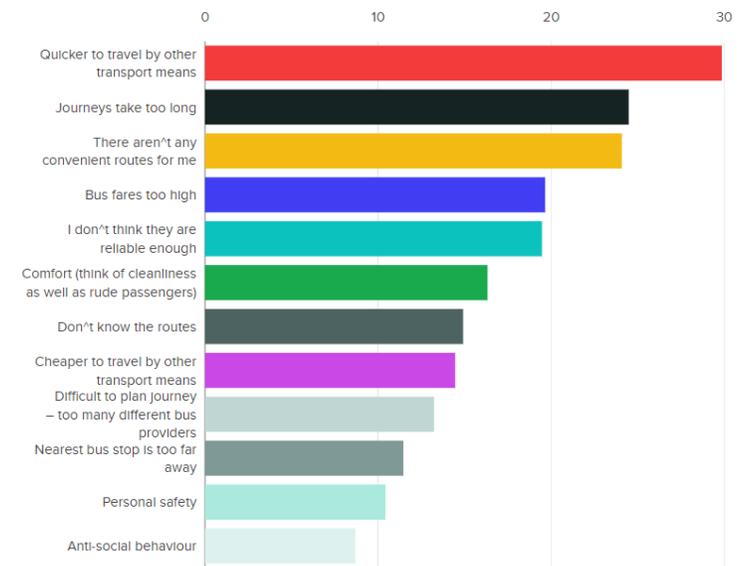
Respondents who had not used a bus within the last 12 months were asked why. The most common reason was around journey time. This was important to all age groups but particularly to the over 55s. Route availability, cost and reliability were also popular responses. Below these were factors including comfort and safety and a lack of information about routes, planning a journey and payment.

Everyone, including those who hadn't used a bus recently, were asked how they would rate the quality of bus services. Around half of respondents rated them as 'good', although this rose to 60% amongst those who had used a bus within the last 12 months.

Q5: How would you rate the quality of local bus services? Even if you have not used local bus services recently please give me your impression from what you know or have heard.



Q3: What, if anything, explains why you have not used the bus in the last 12 months? (tick all that apply)



PERCEPTIONS OF THE CURRENT OFFER

All respondents were asked to rate specific factors associated with bus travel (with results split between 'good', 'neither good nor poor' or 'poor').

More than 50% of respondents rated as 'good':

- Staff attitude (51% good vs 14% poor)
- Personal safety (51% vs 15%).

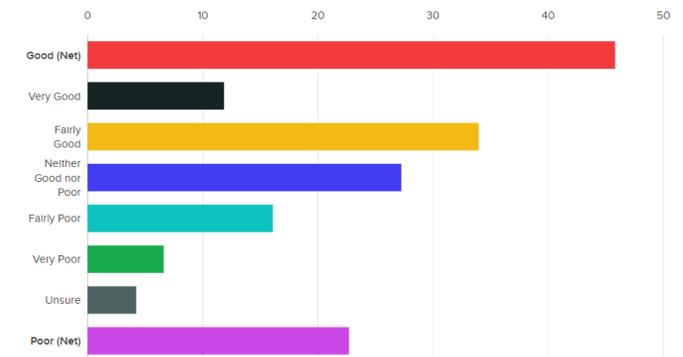
Between 40-50% of respondents rated as 'good':

- Onboard comfort (47% vs 18%)
- Number of places you can visit (47% vs 21%)
- Simplicity of routes (46% vs 20%)
- Availability of information on bus times (45% vs 22%)
- Availability of live times (42% vs 26%)
- Reliability and punctuality of buses (41% vs 28%)
- Availability of information on bus fares (40% vs 26%)
- Frequency of buses (40% vs 31%)

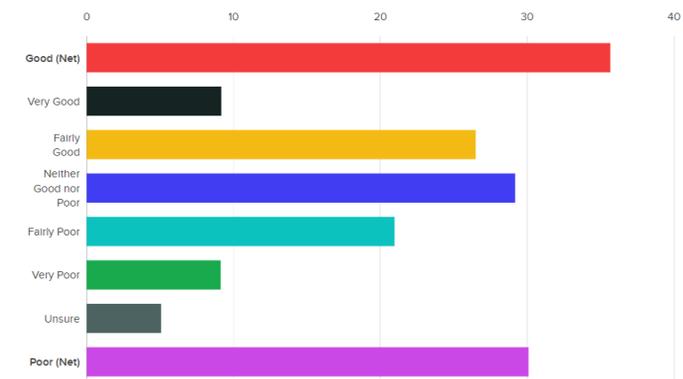
Between 30-40% of respondents rated as 'good':

- Cost (36% vs 30%)

Q6: How would you rate the quality of the following factors, in relation to your local bus service? Even if you have not used local bus services recently please give me your impression from what you know or have heard. Availability of information of bus times



Q6: How would you rate the quality of the following factors, in relation to your local bus service? Even if you have not used local bus services recently please give me your impression from what you know or have heard. Cost

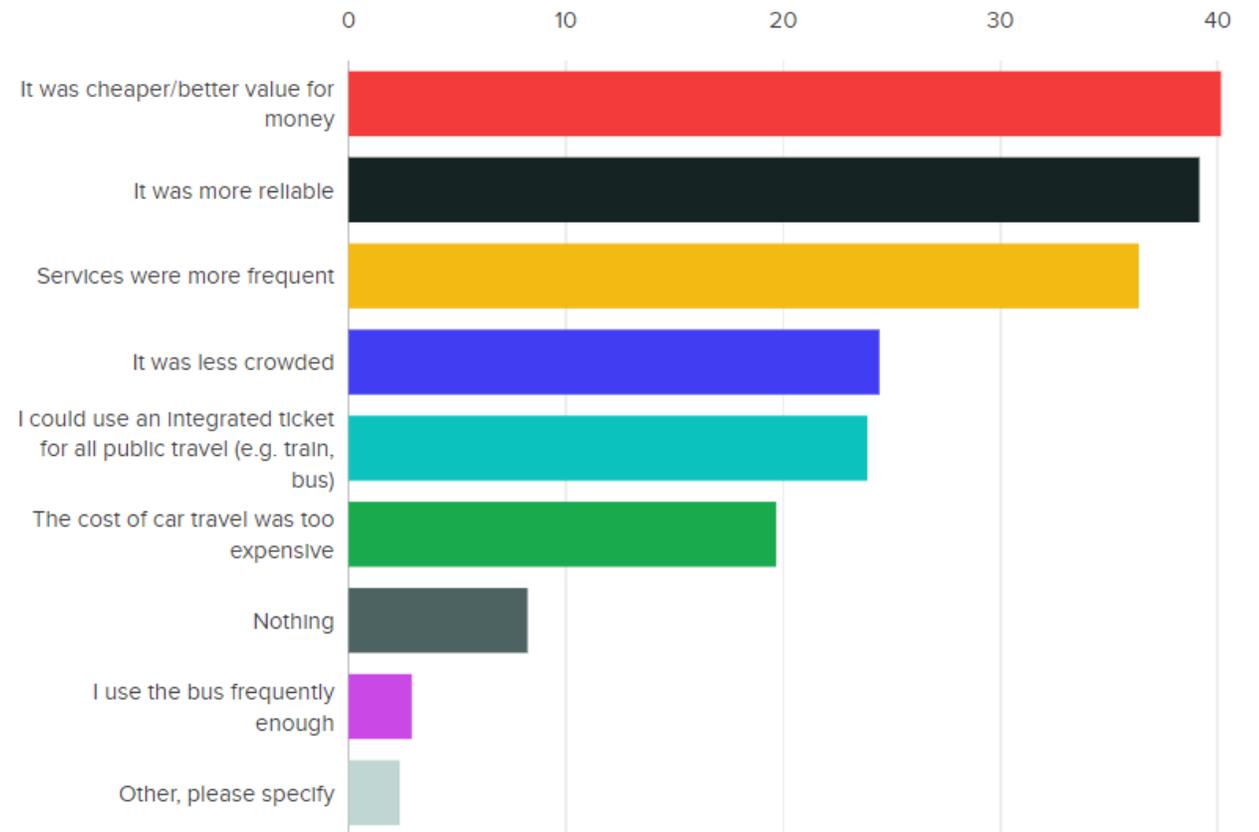


INCREASING PATRONAGE

Respondents were asked what, if anything, would make them more likely to use the bus more often.

Cheaper/ better value journeys was the most popular response and particularly for those under 55. This issue mattered regardless of income level.

Reliability, crowding and integrated ticketing were also more important considerations for those aged under 44. Whereas only 5% of those under 44 said **'nothing'** could make them use the bus more, this rose to 11% and 20% for the 45-54 and over 55 age categories, respectively.



Responses remained broadly consistent amongst men and women and people from different locations (ie, rural, urban) and those on different incomes.

INCREASING PATRONAGE



Respondents were asked to what extent they agreed with four statements regarding what would make them more likely to travel often on buses.

I would use buses more often if...

There was no other way of getting there: 64% agreed (versus 15% who disagreed).

The nearest bus stop was closer: 50% agreed (versus 22% who disagreed).

It was easier to find timetable/ route information: 56% agreed (versus 15% who disagreed).

The cost of fuel/ driving kept increasing: 57% agreed (versus 16% who disagreed).

It is striking that for all four questions, agreement was markedly stronger amongst those aged up to 44 than those aged 45 and over. For example, route information was a factor for 62% of 16 to 24 year olds but only 40% of those aged over 55. The rising cost of car ownership was a factor for 63% of 25 to 34 year olds but only 42% of those aged over 55.



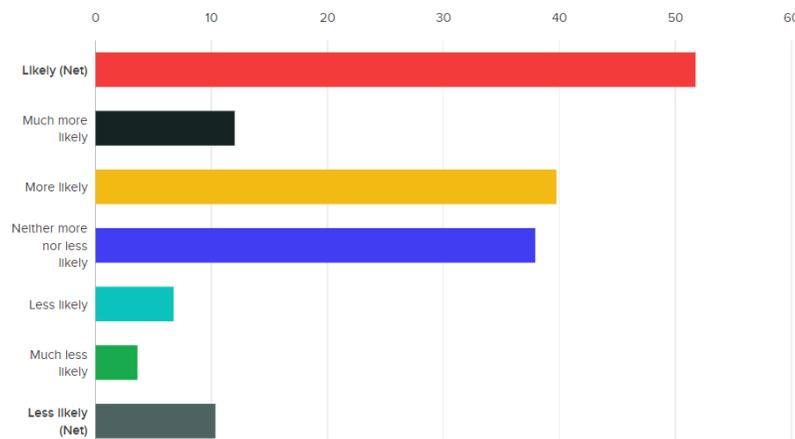
MULTIMODAL JOURNEYS AND INTEGRATED TICKETING

More than half of respondents said they were likely to use more than one mode of public transport (eg bus and train) on a single journey within the next year. Double the amount of 16-24 year olds said this was likely than over 55s (60% as opposed to 30%). 59% of respondents in urban areas said it was likely, as opposed to 48% in rural locations.

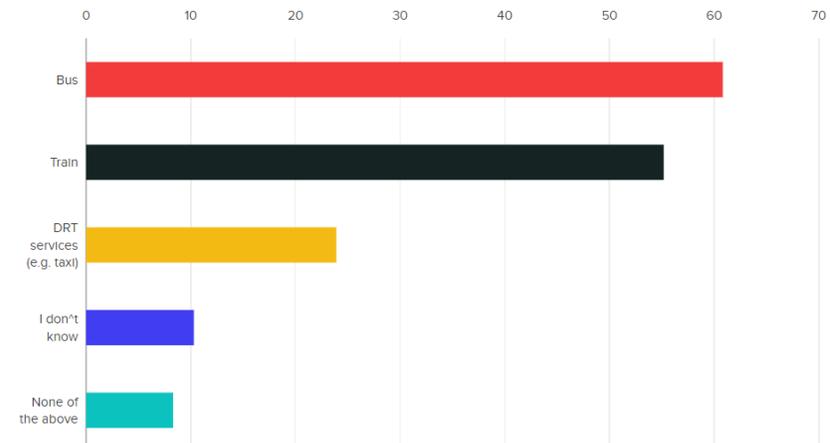
76% of respondents said they would support a smart, integrated ticketing system in their area. Enthusiasm for smart ticketing was highest amongst those aged under 44 and/ or those on higher household incomes. Support was lowest amongst those over 55 and/or those on lower incomes – for both of these categories there were higher levels of 'unsure' responses.

Respondents were also asked which modes of public transport they would be encouraged to use more often if integrated ticketing was introduced – bus was the most popular response.

Q15: How likely or unlikely, would you be to use more than one mode of public transport in one journey, within the next year in England? (e.g. using a bus and a train)



Q11: Which, if any, of the following modes of public transport would you be encouraged to use more often or start to use if the integrated smart ticket system was introduced? (Tick all that apply)



RAIL JOURNEYS

Respondents who answered that they had not travelled via rail in the past 12 months were also asked to indicate why.

The reasons given, for example cost, journey time and availability of stations broadly align with the reasons given by people for not travelling via bus.

- 31% thought train fares were too high as opposed to 20% for bus.
- 18% thought it was quicker to travel by other modes as opposed to 30% who said this for bus.
- 17% thought there weren't any convenient routes as opposed to 24% for bus.
- 14% thought trains weren't reliable enough as opposed to 19% for bus.
- 13% thought it was difficult to plan a rail journey – the same as for bus journeys.

Q8: What, if anything, explains why you have not used the train in the last 12 months? (Tick all that apply)

