

14 June 2018**Agenda Item: 4****REPORT OF CORPORATE DIRECTOR, PLACE****TRANSPORT FOCUS – BUS PASSENGER SURVEY RESULTS 2017****Purpose of the Report**

1. To inform the Committee of the results of the autumn 2017 Transport Focus Bus Passenger survey and key findings.
2. To seek approval to continue funding the Bus Passenger Survey on an annual basis. The survey cost £6.2k in 2017.

Information

3. Transport Focus (formerly Passenger Focus) is the statutory body that represents bus passenger interests. It was renamed Transport Focus from April 2014 reflecting its enhanced role representing users of the strategic road network. It conducts research related to buses including, since 2011, a Bus Passenger Satisfaction Survey. The survey superseded the Department for Transport (DfT) bus passenger satisfaction surveys and covers bus passengers' journey experiences carried out between September and November 2017. It includes a large sample of more than 40,000 passengers nationally.
4. The survey was carried out across 24 local authority areas across the UK including unitary, Shire and Combined Authorities.
5. In previous years the County Council has provided match funding to boost the target level of responses, which enabled operator specific reports to also be provided for the main operators. Three bus operators also provided match funding in 2017: Nottingham City Transport, Stagecoach East Midlands and Trentbarton.
6. The County Council pays annually for the survey to be carried out which cost £6.2k in 2017.

Background

7. Routes considered for selection were all bus services shown on *traveline* (National Bus Enquiry Service – source: ITO World Ltd) where at least 30% of a route, or more than 15 minutes of a route, runs within Nottinghamshire. The survey was conducted among passengers who board those routes within the county boundary.

8. The match funding provided by the County Council and bus operators enabled a total of 1304 responses (of which 368 came from the non-major bus operating group boost) to be received for Nottinghamshire. Respondents were also given the option to complete their survey response online, which it is believed has helped with the overall response rate achieved

Summary of Results

9. The results indicate that overall bus satisfaction in Nottinghamshire has reduced slightly since 2015 to 93% (from 94%). Compared against other local authority areas included in the survey Nottinghamshire was ranked highest for satisfaction with the overall journey and was also the No. 1 ranked authority for all other factors except Personal Safety. However Personal Safety ranking has improved from third to second compared to other two Tier Authorities.
10. Nottingham City Transport, Trentbarton and Stagecoach East Midlands were all ranked in the top 4 of 64 bus companies surveyed for satisfaction with the overall journey.
11. A summary of Nottinghamshire's performance across some of the 31 individual satisfaction measures, compared against other local authority areas is shown below:

Category		Score 2017	Score 2016	Score 2015		Rank 2017	Rank 2016
Overall Satisfaction	=	93%	93%	94%	=	1	1
Bus Stop Overall	=	84%	84%	83%	↑	1	2
Information	=	79%	79%	78%	=	1	1
Punctuality *	↑	83%	82%	83%	=	1	1
The bus driver-helpfulness/attitude*	=	88%	88%	88%	=	1	1
On Bus Journey Time *	↓	88%	91%	93%	=	1	1
Personal Safety	↓	82%	84%	83%	↓	2	1
Value for Money	↓	70%	72%	66%	=	1	1
Note: * Key driver of satisfaction in Nottinghamshire							

12. In Nottinghamshire the top 3 drivers of passenger satisfaction were bus drivers' helpfulness/attitude, on-bus journey time and punctuality.
13. The overall satisfaction score for the Nottinghamshire operators providing match funding are as follows: Nottingham City Transport (94% ranked No. 2 of 64) Stagecoach East Midlands (94%, ranked No. 3 of 64), Trentbarton (94% ranked No. 4 of 64).
14. A chart illustrating a more detailed breakdown of the Nottinghamshire results from the 2017 survey is shown at **Appendix 1**.

Analysis of results

Punctuality

15. The survey was undertaken during a period where there was very few major Highway/Transport improvement schemes being undertaken, with the exception of the Broadmarsh development, which heavily influences public perceptions on punctuality as well as bus journey time. The survey sample, who may have been affected by these works were approximately 22% of respondents, which may account for the drop from 86% to 83%. Another major factor could be increased travel levels due to the upturn in the economy.

16. The survey also asked survey participants 'what could be improved' and the second most important factor was punctuality against 17 different factors.

Journey Time

17. Satisfaction with the on-bus journey time has continued to decrease from 93% in the 2015 survey to 88%. A factor influencing this measure will be the journey purpose with work and commuter type travel more sensitive to any change in this area. Analysis of the survey data indicates that 70% of survey respondents were on a non-commuter journey. Despite the fact that 37% of survey respondents are aged between 16-59 and 63% are concessionary pass holders, who are likely to place a lower priority on the bus journey time, it is a downward trend, that will require some deeper analysis in future years. However it could have been influenced by revised timetable and stopping arrangements due to the Broadmarsh development and as previously reported the fact that timetabled journey times have been lengthened over the years due to the impact of congestion.

Bus Stop and Information

18. In 2017 the Council was ranked No.1 for Bus Stop satisfaction: for the 2016 survey the Council was ranked no. 2. This score has not changed much over the last three years which reflects the continued investment in bus stops to maintain a good quality waiting environment which includes bus shelter, raised kerbs, bus stop clearways, Real Time and paper based information.
19. In 2017 the Council was ranked No.1 for Information and in 2016 NCC was also ranked No.1. This high score is partly due to the high recognition of Real Time displays (48%), timetable information (66%) and route maps (30%) at NCC stops.
20. The Council's sustained investment in new bus infrastructure and the ongoing maintenance of the existing infrastructure continues to yield impressive results that continue to see the Council ranked no.1 compared to other upper tier Authorities. Similarly the investment by the bus companies in high quality vehicles, driver training, the provision of Real Time (and pro-active dynamic disruption) information, smart ticketing and the use of social Media ensures they continue to be some of the top bus operators in the Country.

Value for Money

21. A particular area for improvement identified in 2016 and again for this year is Value for Money. The score decreased from 72% in 2016 (ranked 3/24) to 70% in 2017 (ranked 6/27). It is the lowest scoring of the 31 individual satisfaction measures, in particular amongst passenger's aged 16-34 (68%). This drop in part, will be due to the good progress made in many PTE's areas with the introduction of new fare structures for students and apprentices between the age of 16 and 18.
22. A separate study undertaken earlier this year by Transport Focus 'Using the bus: what young people think Feb 2018' highlighted the issue with Value for Money being their no.1 concern, with 46% desiring improvement.
23. To address Value for money, Transport & Travel Services continue to work with local bus operators and adjoining Local Transport Authorities to deliver integrated ticketing. The Council has progressed plans to introduce smart Integrated ticketing on the pronto corridor, to use as a platform to introduce a wider integrated ticket for Mansfield and in the future, other Market towns. In parallel to this the County Council has started discussions with The Robin Hood Card Steering group (City Council, County Council, trentbarton, Yourbus,

Nottingham City Transport, Marshalls and Stagecoach) to introduce integrated/through ticketing for those travellers outside the conurbation, who need to interchange to other services within the City boundary, to reach their final destination.

24. A further report will follow on Ticketing at a future Committee to update Members on integrated ticketing and other ticketing initiatives to address Value for Money, including Account Based ticketing contactless bank card/mobile phone).
25. Overall the continued investment by the County Council and the bus operators has ensured we have both continued to perform highly amongst comparable Authorities and Unitary Authorities.
26. Nottinghamshire County Council's high ranking in this survey is consistent with the findings of the NHT Public Satisfaction benchmarking Survey.

Proposals

27. It is proposed that we continue to carry out the Transport Focus survey annually (2017 cost £6.2k).

Other Options Considered

28. None.

Reasons for Recommendations

29. The recommendations, including the continued match funding support for the surveys, will ensure that Nottinghamshire County Council is included in future Transport Focus surveys, and ensures that sufficient responses are received to allow for the production of operator specific reports for the main operators.
30. The survey is becoming increasingly relied upon by local authorities and bus operators as an independent benchmark of bus passenger satisfaction.

Statutory and Policy Implications

31. This report has been compiled after consideration of implications in respect of crime and disorder, data protection and information governance, finance, human resources, human rights, the NHS Constitution (public health services), the public sector equality duty, safeguarding of children and adults at risk, service users, smarter working, sustainability and the environment and where such implications are material they are described below. Appropriate consultation has been undertaken and advice sought on these issues as required.

Implications for Service Users

32. The provision of a quality local bus network giving users access to key services, jobs, health and leisure activities together with continued investment in all aspects of the journey experience will help to ensure the results of the 2017 survey are maintained in the future.

Financial Implications

33. The cost to match fund Nottinghamshire's involvement in the survey for the next 3 years is estimated at £6.2k per annum which is contained in the current revenue budget.

RECOMMENDATIONS

It is recommended that Committee:

- 1) Continue their support for Transport Focus annual surveys at a cost of £6.2k per annum to inform future investment priorities and to enable benchmarking against other Local transport Authorities.

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For any enquiries about this report please contact: Gary Wood, Group Manager, Highways and Transport, Tel: 0115 9774270

Constitutional Comments [SLB 17/05/2018]

34. Communities and Place Committee is the appropriate body to consider the content of this report.

Financial Comments [SES 11/05/18]

35. The financial implications are set out in the report.

Background Papers

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

Transport Focus – Autumn 2017 Bus Passenger Survey Report:
<http://www.passengerfocus.org.uk/research/bus-passenger-survey>

Transport focus – Feb 2018 Using the bus: what young people think:
<https://www.transportfocus.org.uk/research-publications/publications/using-bus-young-people-think/>

NHT Public Satisfaction benchmarking Survey 2017
<https://nhtsurvey.econtrack.com/>

Electoral Divisions and Members Affected

All