

23rd June 2015

Agenda Item: 6

**REPORT OF THE SERVICE DIRECTOR TRANSPORT, PROPERTY AND
ENVIRONMENT**

TRANSPORT FOCUS – BUS PASSENGER SURVEY RESULTS

Purpose of the Report

1. To inform the Committee of the results of the autumn 2015 Transport Focus Bus Passenger survey and key findings.

Information and Advice

2. 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 The survey superseded the Department for Transport (DfT) bus passenger satisfaction surveys and covers bus passengers' journey experiences carried out between September and November 2015. It included more than 40,000 passengers overall nationally.
3. The survey was carried out across 24 local authority areas across the UK including 16 unitary or shire authority areas. Nottinghamshire also participated in the 2014 survey, and the results were reported to Transport & Highways Committee on 21st May 2015.
4. In 2014 the County Council 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 2015: Nottingham City Transport, Stagecoach East Midlands and TrentBarton.
5. This survey complements the NHT Public satisfaction benchmarking survey reported to Transport and Highways Committee on the 19th March 2015.

Background

6. 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.

7. The split of bus routes surveyed was; 38% in the Greater Nottingham Travel to Work Area was and the remaining 62% in the rest of the County.
8. The match funding provided by the County Council and bus operators (Nottingham city transport, Stagecoach East Midlands and TrentBarton) enabled a total of 1,310 responses to be received for Nottinghamshire which exceeded the target number of 1,300 and represented a survey response rate of 36%. For the first time this year respondents were 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 improved since 2014 to 94% (from 93%). 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 information, the bus driver-helpfulness/attitude and on bus journey time.
10. A summary of Nottinghamshire's performance across some of the 31 individual satisfaction measures, compared against other local authority areas is shown below. The 'Overall Satisfaction' score is not an aggregate score of all seven categories.

Category		Score 2015	Score 2014	Score 2012		Rank 2015	Rank 2014	Rank 2012
Overall Satisfaction	↑	94%	93%	87%	↑	= 1	3	9
Bus Stop Overall	↓	83%	90%	81%	↓	= 3	1	4
Information	↓	78%	83%	75%	↑	1	2	5
Punctuality *	↓	83%	86%	69%	↓	4	3	14
The bus driver-helpfulness/attitude*	↑	88%	86%	79%	=	1	1	2
On Bus Journey Time *	↑	93%	89%	84%	↑	1	6	12
Personal Safety	=	83%	83%	80%	↑	=3	4	2
Value for Money	↓	66%	68%	65%	↑	=6	7	2

Note: * Key driver of satisfaction in Nottinghamshire

11. In Nottinghamshire the top 3 drivers of passenger satisfaction were bus drivers' helpfulness/attitude, on-bus journey time and punctuality.
12. The overall satisfaction score for the Nottinghamshire operators providing match funding are as follows: Nottingham City Transport (ranked No. 1 of 53) Stagecoach East Midlands (ranked No. 7 of 53), TrentBarton (ranked No. 3 of 53).
13. A chart illustrating a more detailed breakdown of the Nottinghamshire results from the 2015 survey is shown at Appendix 1.

Analysis of results

Punctuality

14. The survey was undertaken soon after the introduction of the NET tram lines 2 and 3. The survey, therefore partly reflects the positive experience of passengers following the introduction of the new tram routes, including new connection opportunities between tram and bus/rail and the completion of roadworks ; which will have accounted for a higher than expected punctuality score, even though it was lower than 2014.

Journey Time

15. Satisfaction with the on-bus journey time has improved from 89% in the 2014 survey to 93%. 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 79% of survey respondents were on a non-commuter journey outside peak hours. 38.3% of survey respondents are aged between 16-59 and 60% are concessionary pass holders, who are likely to place a lower priority on the bus journey time, which will have contributed to the increase in the score.
16. It is important to also note that in the Nottingham area peak hour journey times have increased by 17% since 1999, due to increased congestion in the Nottingham conurbation which has increased bus journey time variability and reduced punctuality; which has culminated resulted in the bus companies increasing timetable times to meet Traffic Commissioner legal requirements (95% within 1 minute early 5 minutes late). However since 2006 these increases have rose at a lower rate of 5.8% which may be due to the downturn in the economy, increased enforcement and 'smart ' bus priority measures such as Automatic Vehicle Location Traffic Light Priority.

Bus stop and Information

17. In 2014 the Council was ranked No. 1 for Bus Stop satisfaction; however for the 2015 survey the Council was ranked equal third with a modest reduction in the survey score to 83%. This score is still higher than the 2012 survey score, and reflects the challenge with maintaining passenger expectations when high levels of satisfaction are achieved against a backdrop of maintenance funding challenges since 2010. From 2010 onwards Local Transport Plan Integrated Transport Measures funding levels have reduced year on year but have been supplemented by successful funding bids for European Regional Development Fund, Growth Point, Section 106 developer contributions and Better Bus Areas monies, whilst there has been a £130k Maintenance base budget reduction and no annual real term increases in Maintenance budgets since 2010. We have, however, managed to contain these increased maintenance costs from other budgets to date.
18. In 2014, the Council was ranked No.2 for Information and in 2015 we have been ranked No.1. Similarly to bus stop satisfaction, we have seen a reduction in the overall score from 83% to 78% which reflects passengers' high expectations, especially in relation to the provision of Real Time Passenger information at stop; inclusive of disruption information caused by roadworks.

Value for Money

19. A particular area for improvement identified in 2014 and again for this year is Value for Money. The score decreased from 68% in 2014 (ranked 7/27) to 66% in 2015 (ranked 10/24). It is the lowest scoring of the 31 individual satisfaction measures, in particular amongst passengers aged 16-34 (59%).
20. To address Value for Money, Transport & Travel Services continue to work with local bus operators and Nottingham City Council to increase the availability of smart ticketing products, including the recent launch of the Robin Hood Card and future planned products including season passes, together with plans for smart ticketing on the Pronto service between Mansfield and Nottingham/ Chesterfield and an integrated ticket for the Nottinghamshire market towns. The Integrated Ticketing Strategy and Delivery Plan for Nottinghamshire is playing an important role in helping to achieve the County Council's vision for a better Value for Money and more affordable public transport offer.
21. However for residents aged between 16-21, whilst the Integrated Ticketing strategy delivers better Value for Money for those people interchanging between different transport providers, the County Council is unable to influence ticket prices and ensure they are the most attractive proposition for users. Also for those residents just turning 16, they face an increased cost to travel of 75%-100% for a typical basket of cash fares, with the level of increase at the lower end for holders of operator smartcard products. The availability of day and season/term tickets does help to offset the level of increase, however for all users whether in work or education, it may help to account for the low score among this cohort of users, as transport costs make up a significant proportion of their total outgoings. The County Council will continue to work with operators to address this challenge, even though we cannot determine ticket prices or levels of discount.
22. It's important that continued investment in all aspects of the bus journey experience are sustained in future years by NCC to ensure high satisfaction ratings. This includes investment in :
 - bus stations and on street interchanges .
 - bus stop facilities and information provision including real time information.
 - targeted ticketing for young people and unemployed .
 - integrated ticketing to ensure value for money and increase travel opportunities.
 - highways improvement schemes incl bus priority.
 - Traffic management including clearways and bus stop clearways.
 - Enforcement of static and moving offences to keep buses and general traffic moving.

The operators similarly need to invest:

- fully accessible vehicles incl. wi-fi
 - smart ticketing to reduce boarding times and provide market intelligence.
 - Integrated ticketing .
 - real time passenger information including exception information about delays.
 - driver training in customer service .
23. Overall the continued investment by the County Council and the bus operators has ensured that public transport continues to meet customer needs and perform highly amongst comparable Authorities and Unitary Authorities.

24. Nottinghamshire County Council's high ranking in this survey is consistent with the findings of the NHT Public Satisfaction benchmarking Survey.
25. The Committee should note that that at its meeting on 21st May 2015 it approved the continued match funding contribution to the survey up to the 2019 survey.

Reasons for Recommendations

26. 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.
27. 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

28. This report has been compiled after consideration of implications in respect of finance, equal opportunities, human resources, crime and disorder, human rights, the safeguarding of children, sustainability and the environment and those using the service 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

29. 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 2015 survey are maintained in the future.

Financial Implications

30. The cost to match fund Nottinghamshire's involvement in the survey for the next 4 years is estimated at £6k per annum which is contained in the current revenue budget.

RECOMMENDATIONS

It is recommended that Committee:

- 1) Note the report

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For any enquiries about this report please contact:

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Constitutional Comments (SJE – 02/06/2016)

31. As this report is only for noting by Committee, Constitutional Comments are not required.

Financial Comments (DJK 01.06.16)

32. The financial implications are set out in paragraph 30 of 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 2014 Bus Passenger Survey Report:

<http://www.passengerfocus.org.uk/research/bus-passenger-survey>

Transport Focus- Autumn 2015 Bus Passenger Survey Report:

<http://www.transportfocus.org.uk/research-publications/publications/bus-passenger-survey-full-report-autumn-2015/>

Transport Focus – Autumn 2015 Bus Passenger Survey Report data tool:

<http://data.passengerfocus.org.uk/bus/>

Transport and Highways Committee, 19th March 2015; Performance Report– Transport and Travel Services

Transport and Highways Committee, 21st May 2015;

Passenger Focus-Bus Passenger Survey Results

Electoral Divisions and Members Affected

All