Main Findings

■ Bus passenger satisfaction in 2004 is high across Scotland with ratings for the overall service indicating that the average passenger is more than ‘satisfied’. Particularly high satisfaction is seen for the accessibility of bus stops and the ease of paying fares. Low ratings are seen for information at bus stops and the cleanliness of bus stops.

■ Satisfaction varies from region to region and with the degree of urbanisation (typology). Users over 60 are noticeably more satisfied than those under 60, probably due to the availability of free local travel for the over 60s. Differences between men and women, frequent and infrequent travellers, car owners and non-car owners and those on low and high incomes are much less marked.

■ Statistical analyses indicate that the most common significant influences on levels of satisfaction in 2004 were region, urban/rural typology, age and whether or not the respondent had made a complaint recently.

■ Comparison of these analyses with those conducted in previous years indicates that typology (urban/rural) is becoming increasingly important as satisfaction declines in remote rural typologies and rises in large urban typologies.

■ A comparison of the levels of satisfaction recorded in 2004 with those recorded in 2003 and 2002 indicates that 2004 satisfaction levels generally do not differ significantly from the 2002 levels though they are often lower than the levels recorded in 2003. Only passengers from the remote rural typology (including remote small towns and rural areas) and those in ‘Central, Fife and Tayside’ show widespread declines in satisfaction when compared with 2002 levels. Passengers in these groups are also most likely to show consistently declining satisfaction over the three surveyed years.

■ The regions used to subdivide the data are based on the former regional council areas (1. Highlands and Islands, 2. Grampian, 3. Central, Fife and Tayside, 4. Lothians, 5. Strathclyde and 6. Scottish Borders and Dumfries & Galloway). These do not correspond to the areas of operation of any particular bus operators. Thus levels of satisfaction within areas cannot be simply related to good or poor provision by any one operator. Additionally, changing levels of satisfaction can rarely be related simply to changes in service provision. Levels of satisfaction are a complex product of user expectations and levels of service.
Introduction

In November 2002, 2003 and 2004 a telephone survey was carried out across Scotland aimed at assessing bus passengers’ attitudes towards their local bus services. These surveys are part of an ongoing assessment of satisfaction with Scotland's bus services.

The aim is to monitor changes in satisfaction levels producing information which will be fed into other statistical monitoring of the bus and coach market. This will provide a more rounded picture of local bus services, and will enable future decision making and policy development to take account of passengers’ needs and preferences.

Methodology

Survey design and administration

The survey questionnaire used in 2004 was very similar to that used in previous years. Questions covered all the aspects of bus services of concern to passengers as derived from focus groups carried out before the first survey.

Telephone interviews were undertaken with a representative sample of 1751 bus passengers over 15 years of age who had travelled locally on a bus at least once during the preceding month. The interviews were carried out in accordance with the MRS code of conduct and quality assurance criteria.

Selection of survey group

Respondents were selected from a series of pre-selected postcode sectors throughout Scotland. These were chosen to ensure that there was an even coverage across regions and urban and rural typologies.

Within each region and urban/rural typology a quota control was applied to the data collection which was based on:

- age (16-59 / over 60)
- gender (male / female)
- frequency of bus use (less than 3 journeys a week / 3 or more journeys a week)
- Car ownership (no cars in household / at least one car in household)

Information collected

General demographic data was collected, as was information on trip purpose.

Passengers were asked to concentrate on their experiences during one particular recent journey and to state their level of satisfaction with around 30 aspects of the bus service. These aspects are shown in the headings of the following tables.

Satisfaction ratings were recorded on a scale running from 5 (very satisfied) to 1 (very dissatisfied). The ratings were then averaged and multiplied by 20 to give the figures presented here. Also shown is a composite average which is useful as an indication of the average ‘Scottish’ experience.

2004 Survey Results

Characteristics of respondents

Respondents were spread over all of the Scottish regions and were drawn from both urban and rural typologies. Approximately 60% were women, 40% were over 60, 30% had no car and 50% of those who gave income information had gross household incomes of less than £15,000 a year.

Satisfaction levels

A rating of 100 would indicate that all respondents were ‘very satisfied’. 80 indicates that respondents are ‘satisfied’ on average and 60 would indicate that respondents were ‘neither satisfied nor dissatisfied’ on average. A rating of 85.9 was found for the overall service and most individual aspects of services scored above 80. The highest levels of satisfaction were found for the accessibility of bus stops (86.1) and the ease of paying fares (85.6). The lowest ratings are seen for information at bus stops (72.1) and their cleanliness (74.9).

Variation in satisfaction between groups

Satisfaction varied with region (see the footnote to the methodology) with those in Grampian being, overall, most satisfied and those in the Lothians least satisfied. When passengers are divided according to typology those in large urban typologies are most satisfied and those in other urban typologies are least satisfied.

Older people are more satisfied than younger people, particularly with value for money and the ease of paying the fare. This higher satisfaction generally, and with these aspects in particular, is likely to be associated with the widespread use of concessionary bus passes.

There are only slight differences in satisfaction between men and women, frequent and infrequent users, non-car owners and car owners and those on low and high incomes.

Statistically significant influences on satisfaction

Statistical analyses indicated that the significant influences on satisfaction were region, typology, age and if the respondent had complained recently. Gender, income, frequency of bus use and the number of cars available to a household were rarely significant.

1 Six regions were used which were based on the former Scottish council regions. These were:

1) Highlands and Islands (Highland, Orkney, Shetland and Eilean Siar)
2) Grampian (Aberdeen City, Aberdeen and Moray)
3) Central, Fife and Tayside (Clackmannan, Falkirk, Fife, Angus, Dundee City, Perth & Kinross and Stirling)
4) Lothians (East Lothian, West Lothian, Midlothian and City of Edinburgh)
5) Strathclyde (Glasgow City, East Dunbartonshire, West Dunbartonshire, North Lanarkshire, South Lanarkshire, Renfrewshire, East Renfrewshire, Inverclyde, Argyll and Bute, East Ayrshire, North Ayrshire and South Ayrshire)
6) Scottish Borders and Dumfries & Galloway (Scottish Borders and Dumfries & Galloway)
In cases where region was important, maximum satisfaction levels were shared between the Highlands and Islands, Grampian and the Scottish Borders, Dumfries & Galloway and the lowest values tended to appear in the Lothians and in Strathclyde but dependences vary from attribute to attribute.

Where typology was important large urban typologies most commonly showed the highest levels of satisfaction and the lowest levels generally applied to other urban typologies.

In all cases where age was important older people were more satisfied than younger people and, if having complained was important, those who had complained recently were less satisfied than those who had not.

Each of these four factors identified in 2004 had been significant influences in one or both of the two previous surveys (2002 and 2003). In 2003 region, age and having complained were identified as the significant influences. Typology, which had been identified in 2002 but not in 2003, returned as a significant influence in 2004 because of continuing declines in satisfaction in remote rural typologies those recorded in 2002 – half showing increases and half showing significantly different levels of satisfaction in 2004 to those recorded in 2002 – half showing increases and half showing significantly different levels of satisfaction in 2004 to

Changes in satisfaction - All respondents

Satisfaction, in 2004, with the overall service was 85.9, significantly higher than the 2002 value (84.3) and not significantly different from the 2003 value (86.4). However, there was a tendency for fewer respondents to be ‘very satisfied’ or ‘very dissatisfied’ than was the case in 2003.

Generally the 2004 satisfaction levels with individual aspects of services tended not to differ significantly from the 2002 values though they were, in many cases, lower than the 2003 values (see Table 1). There is, however, a consistent decrease over the three years in levels of satisfaction relating to the provision of information at bus stops. Six variables show significantly different levels of satisfaction in 2004 to

Table 1: Notable trends in satisfaction for all respondents and for respondents divided according to region and typology.


#### Key:
- **32**: consistently rising satisfaction
- **33**: consistently falling satisfaction

For the trends marked the 2004 value differs significantly from at least one other year

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Changes in satisfaction in different regions
The most widespread changes occurred in the Highlands and Islands and Central, Fife and Tayside. In the Highlands and Islands, eight service aspects show lower levels of satisfaction than in 2003 but none are significantly lower than in 2002. In Central, Fife and Tayside there have been a number of significant drops in satisfaction levels and 11 service aspects have indications of steadily declining levels of satisfaction (Table 1). The modern council regions included in the six regions used in the study are explained in the footnote to the methodology.

Changes in satisfaction in different age groups
Both older and younger people show declining rather than rising levels of satisfaction though the 2004 values are mostly similar to the 2002 values. Consistent declines over time are seen in satisfaction with value for money for younger people, the availability of storage for older people and with the information provided at bus stops for both groups (Table 2).

Changes in satisfaction amongst men and women
Men and women show levels of satisfaction generally similar to those recorded in 2002 but lower than those found in 2003 (Table 2).

Changes in satisfaction amongst frequent / infrequent users
Most attributes show satisfaction levels lower than those recorded in 2003 and similar to those recorded in 2002. For frequent users satisfaction with the availability of seating has risen across the three years of the study (Table 2).

Changes in satisfaction amongst car owners / non-car owners
Car owners show satisfaction levels generally similar to those identified in 2002 but lower than 2003 levels. Non-car owners show changed levels of satisfaction in fewer attributes but follow a similar pattern (Table 2).

Table 2: Notable trends in satisfaction by age, gender, frequency of use, level of car ownership and income

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<th>Key:</th>
<th>consistently rising satisfaction</th>
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Changes in satisfaction in different income groups
Satisfaction levels amongst those on high incomes are steady. For those on low incomes satisfaction with seven attributes is lower than in 2003 and satisfaction with one attribute is higher. There is a notable trend in satisfaction with one attribute (Table 2)

Relating changes in satisfaction to changes in service provision
Where there had been large changes in levels of satisfaction council officers were consulted to see if these changes could be explained by changes in provision. The results of this process indicated that changes in satisfaction can rarely be related directly to provision and are more likely to be a complex function of levels of provision, expectations, media coverage and prevailing local attitudes.

Conclusion
Results from the three available surveys (2002, 2003 and 2004) show that user satisfaction with the overall service is high and levels of satisfaction are slightly higher in 2003 and 2004 than in 2002. However, it must be noted that the series of surveys is focused on the satisfaction levels of bus users and does not address satisfaction amongst people who rarely or never use buses.

Satisfaction varies with region, urban/rural typology, age and if a respondent had complained but is less influenced by gender, car ownership and income. Most notably older people are more satisfied probably because of the concessionary travel they have access to.

Levels of satisfaction with different aspects of services are relatively stable from year to year with the 2004 values being mostly similar to the 2002 values. The 2003 values tend to be higher. Within this general pattern there are some interesting features though it is too early to identify long term trends with any confidence. Specifically, large urban typologies appear to be showing generally rising levels of satisfaction while remote rural typologies tend towards declining satisfaction. Users in Central, Fife and Tayside are also showing declining satisfaction with many aspects of service. However, in all three cases satisfaction with overall service is holding steady.

Levels of satisfaction are a complex product of both expectations and levels of service and changes in satisfaction often cannot be directly related to good or poor provision in any one region or to identifiable changes in provision.
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